

Travel Montana

Website Evaluation

visitMT.com

Website Intercept Study

Website Traffic Analysis

Website Conversion Study

January 2008



the sixth sense of business™

Methodology...

Initial Website Intercept Study:

- From May–July 2007, 1,208 visitors to the visitMT.com website answered a pop-up intercept survey regarding their perceptions of Montana and the website, demographics, site usage, and travel intentions & behaviors.

Website Traffic Analysis:

- January 2006–July 2007 WebTrend data July analyzed
- WebTrends tracks website traffic metrics on visitMT.com

Conversion Study

- Participants from the initial website intercept study were contacted by e-mail to conduct a follow-up survey. The survey took place in November. Participants answered questions about whether they travelled to Montana in the summer, activities, and amount spent on those activities. Participants are assumed to be representative of website visitors. Based on the percentage of website visitors who visited Montana (conversion rate) and the average amount spent in MT, a website ROI is calculated based on investments related to visitMT.com and unique visitors to the website.



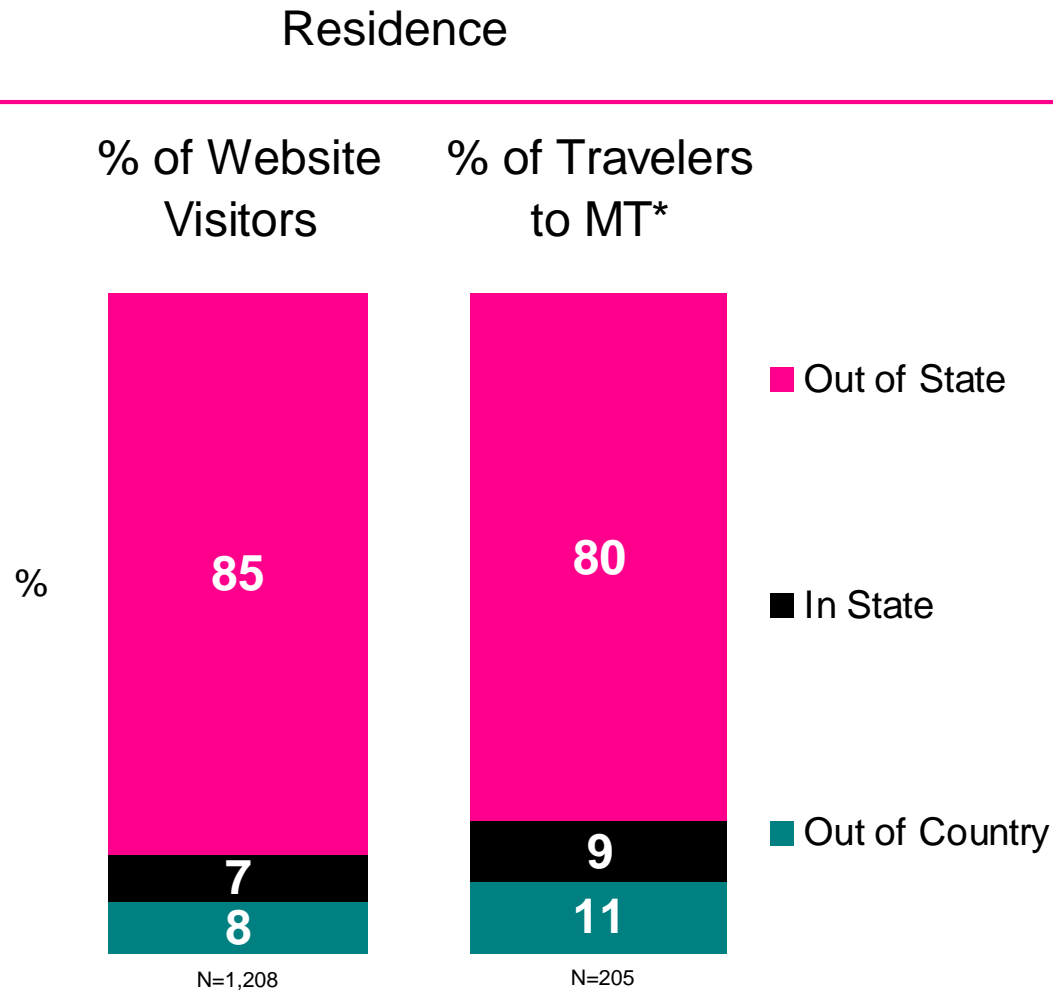
Summer Website Evaluation Review

- Demographic profile (p.4)
- Typical travel profile (p.16)
- Past MT vacation behaviour (p.23)
- Travel intent (p.32)
- Montana's image (p.38)
- Website usage (p.41)
- Website effectiveness (p.46)
- Feedback for potential website improvements (p.55)
- Website traffic analysis (p.57)
- Website Conversion Study and ROI (p.68)
- Recommendations (p.86)

Demographic Profile of ...Website Visitors and Actual Travelers to MT...



Vast majority of Website Visitors and leisure Travelers in MT live outside of MT

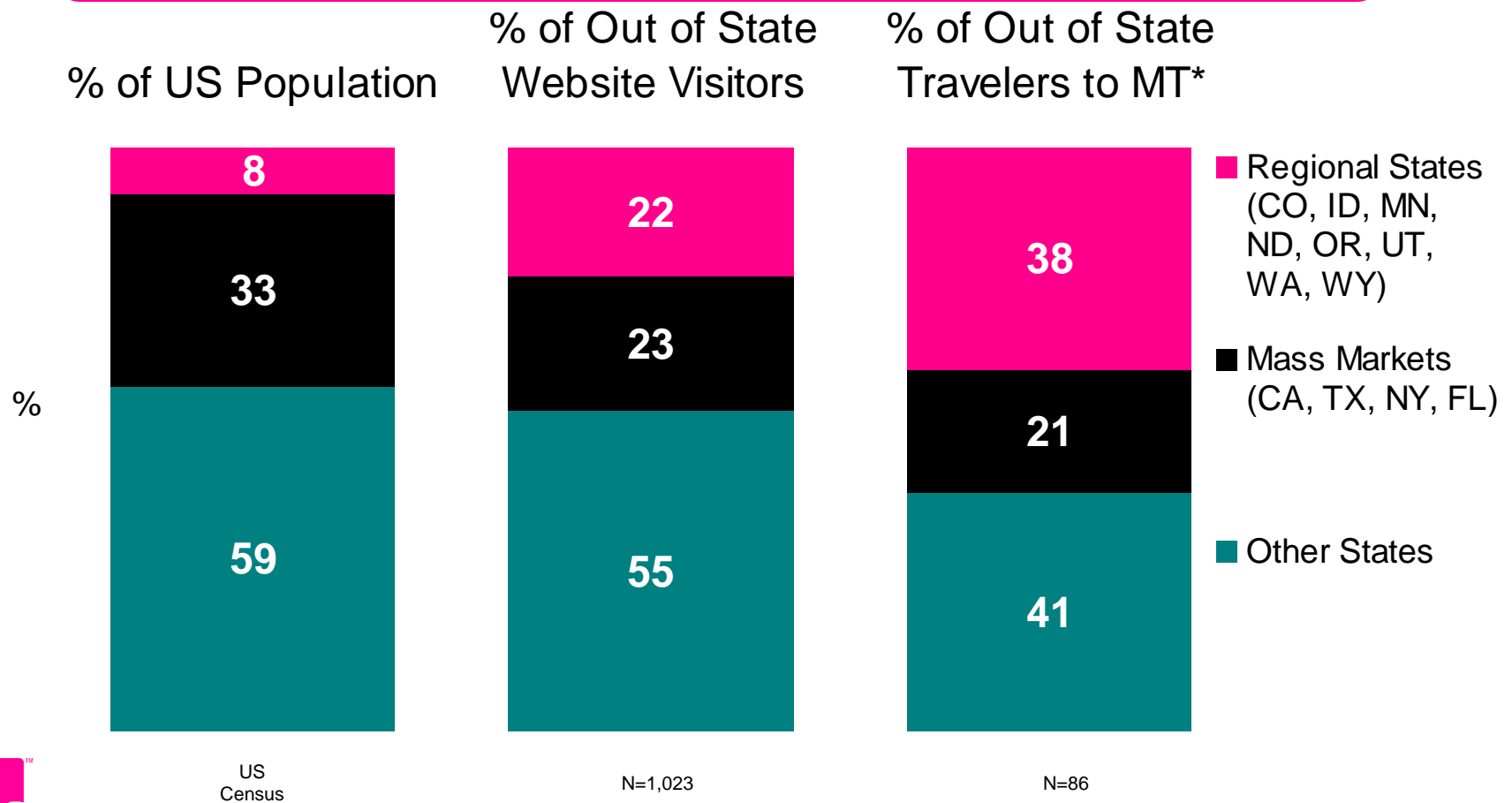


Q1: Where do you live? (Select one)

*Participated in follow-up conversion study

Regional States have the highest conversion rate, as indicated by their disproportionate share of travelers. Mass Market's share of website visitors and travelers are nearly the same. Other States' have the lowest conversion rate, as indicated by their lower share of travelers, compared to website visitors.

Residence of Out of State* Website Visitors and Travelers



Q1: Where do you live? (Select one)

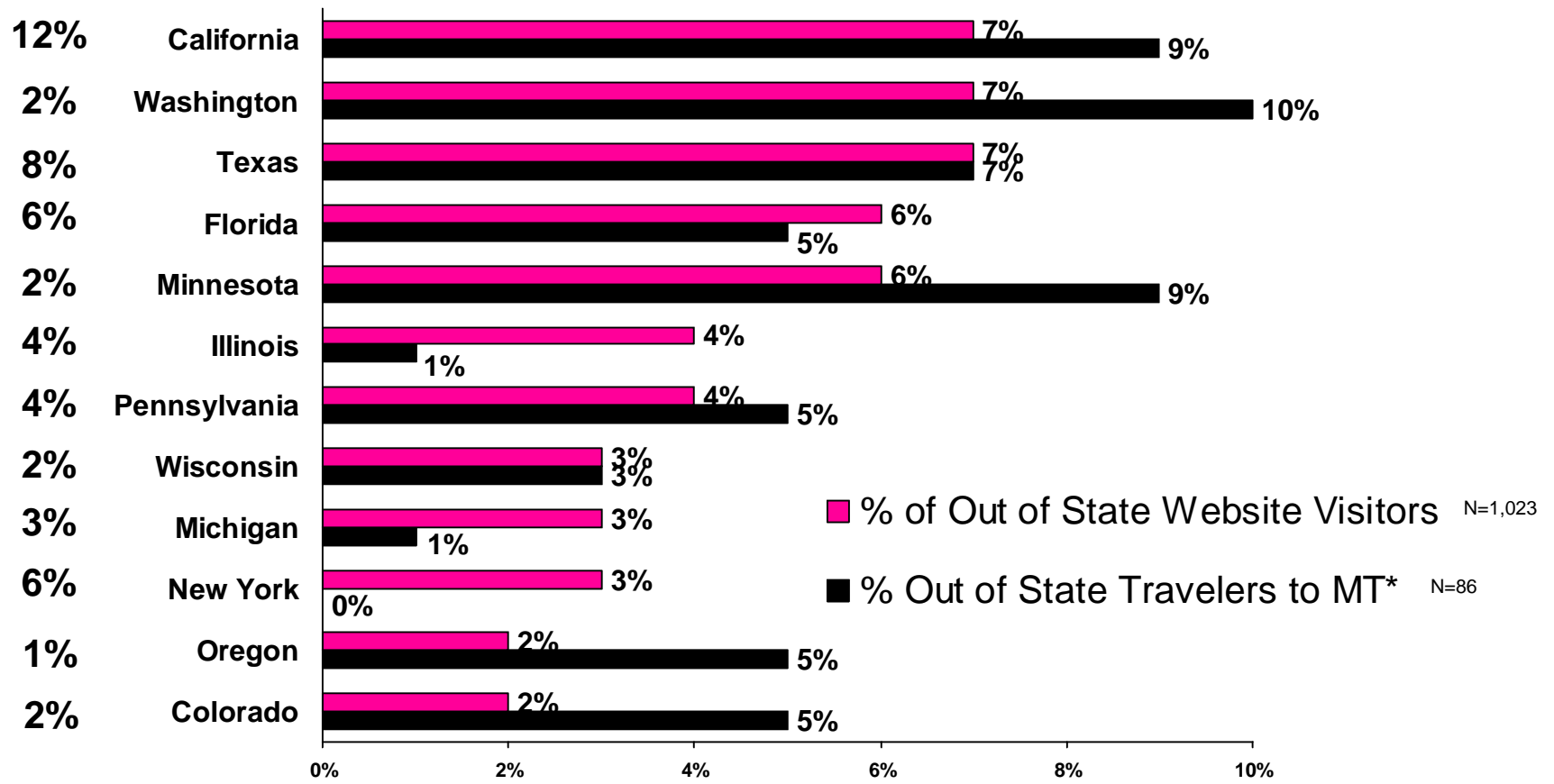
*Participated in follow-up conversion study. Out of State Travelers to MT in this slide's analysis does not include out of country participants.

Washington state is the #1 source of actual summer travelers

Other regional states, like MN, OR & CO, are among top sources

Residence of Out of State* Website Visitors and Travelers

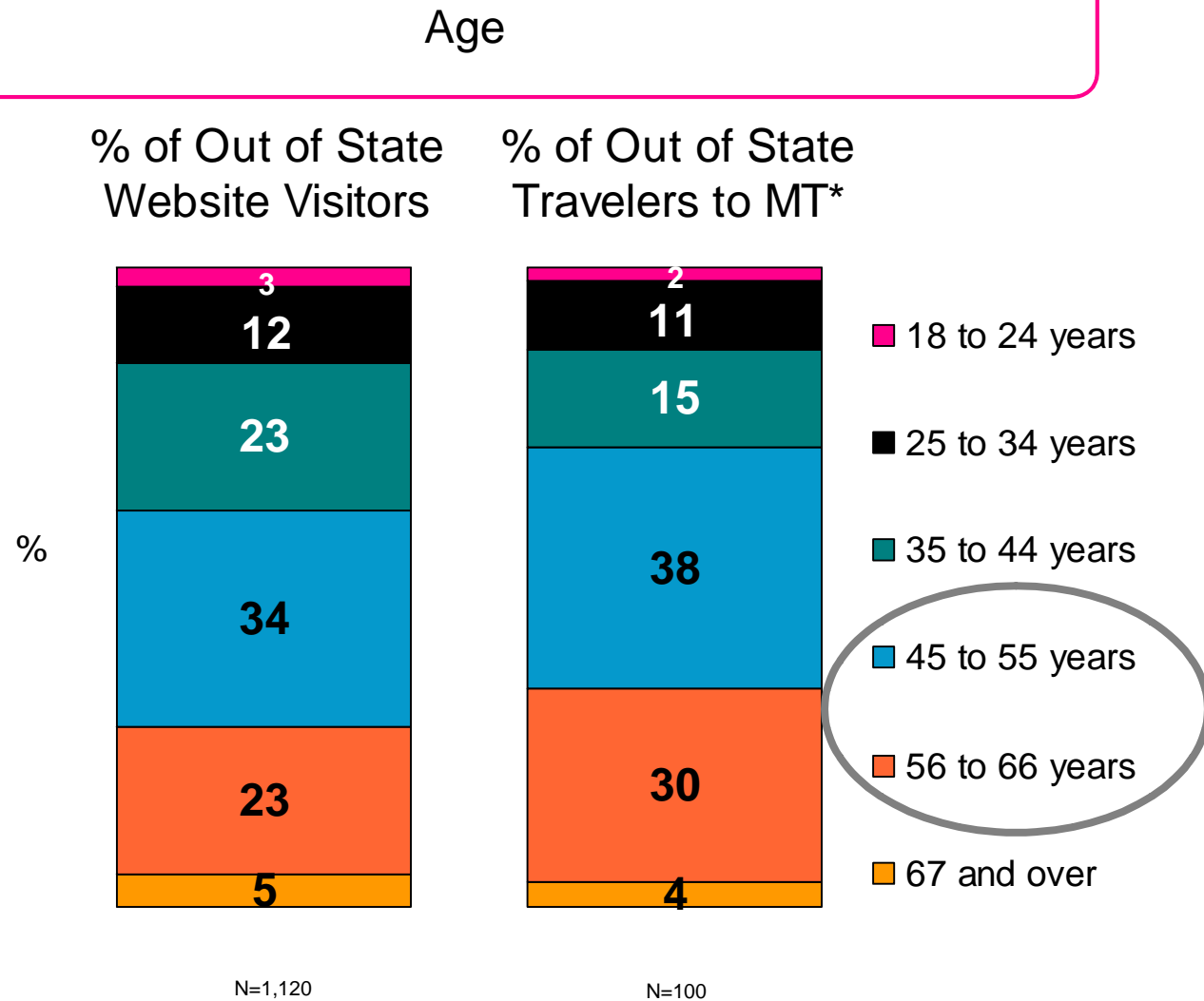
% of US Population**:



Q1: Where do you live? (Select one)

*Participated in follow-up conversion study. Out of State Travelers to MT in this slide's analysis does not include out of country participants. **Rounded percentages.

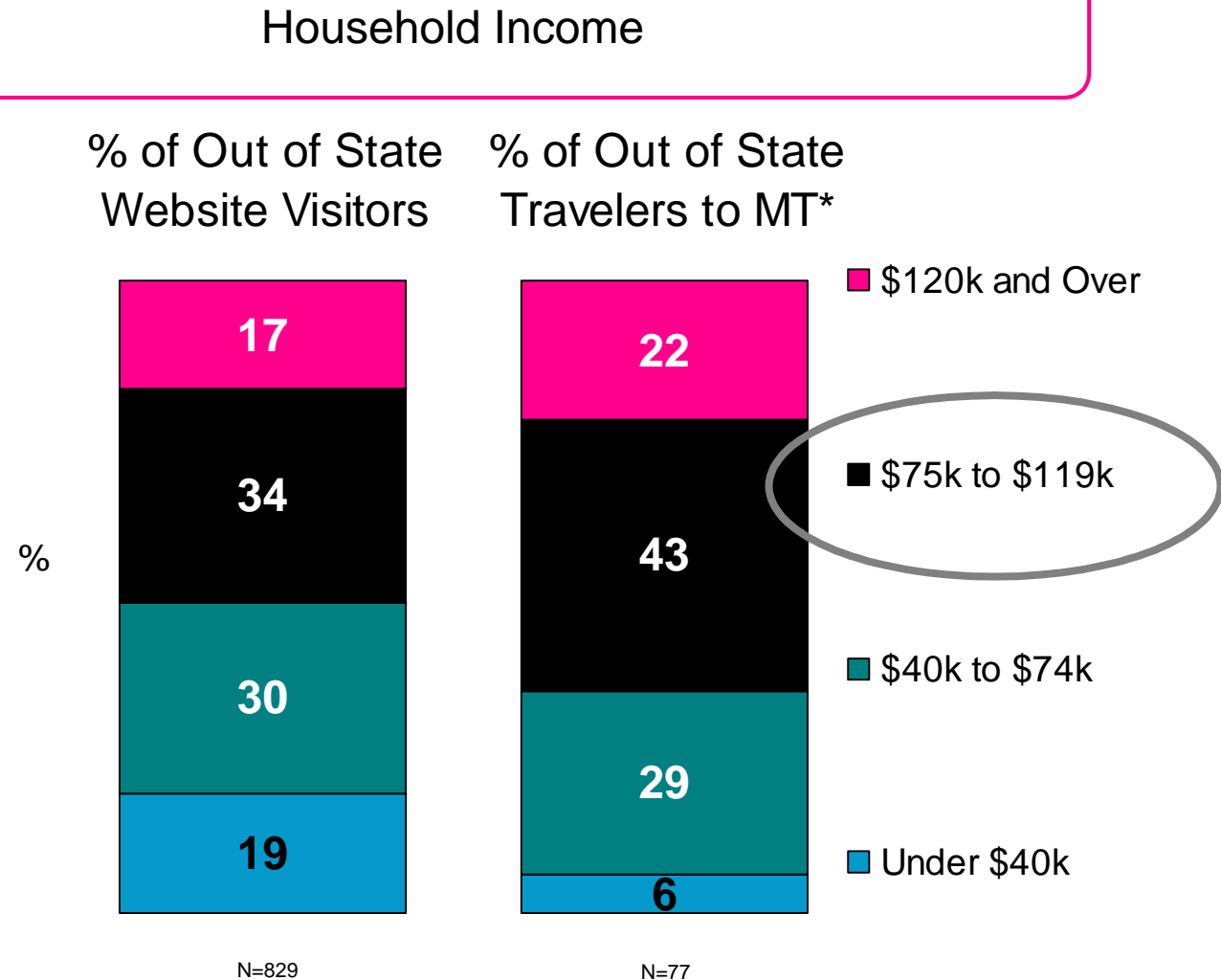
Majority of Website Visitors and Travelers to MT are Baby Boomers



Q3: What is your age? (Select one)

*Participated in follow-up conversion study

\$75k—\$119k group is a key website and traveler group



Q39: Which of the following categories best describes your household's total yearly income before taxes? (Select one)

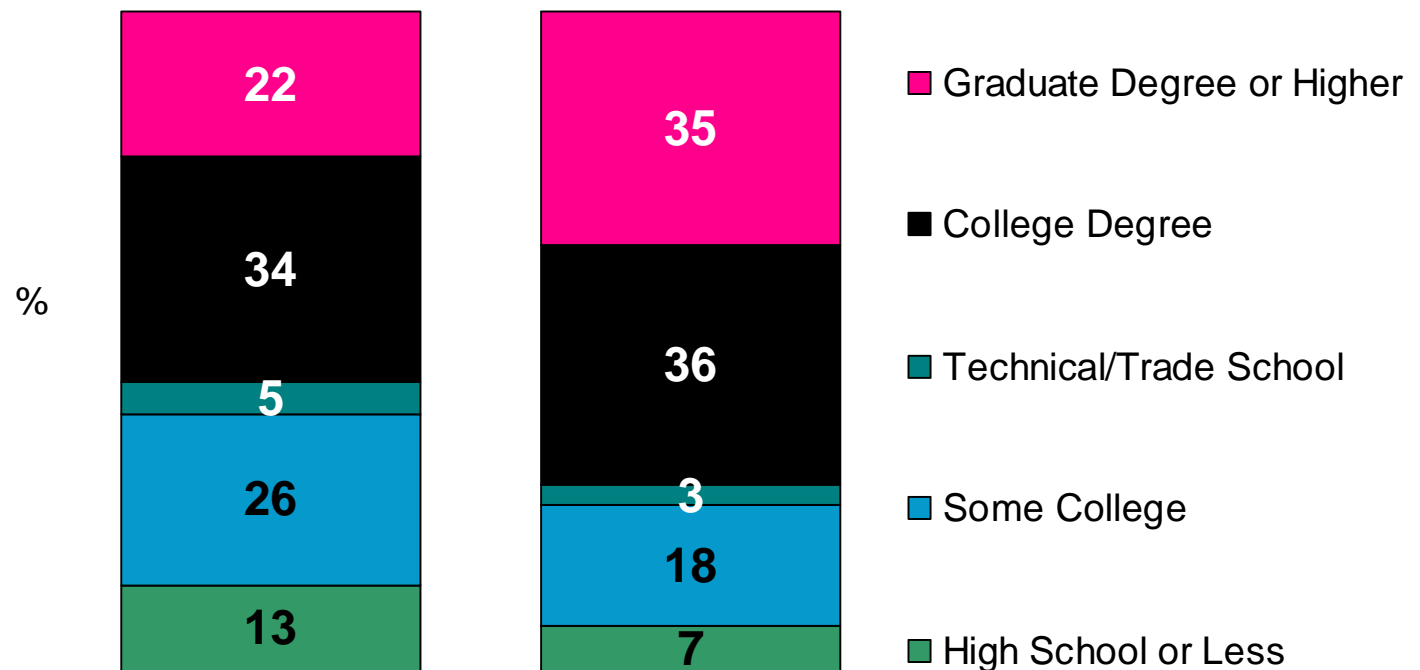
*Participated in follow-up conversion study

Large majority have a college degree or more

Education

% of Out of State
Website Visitors

% of Out of State
Travelers to MT*



N=1,055

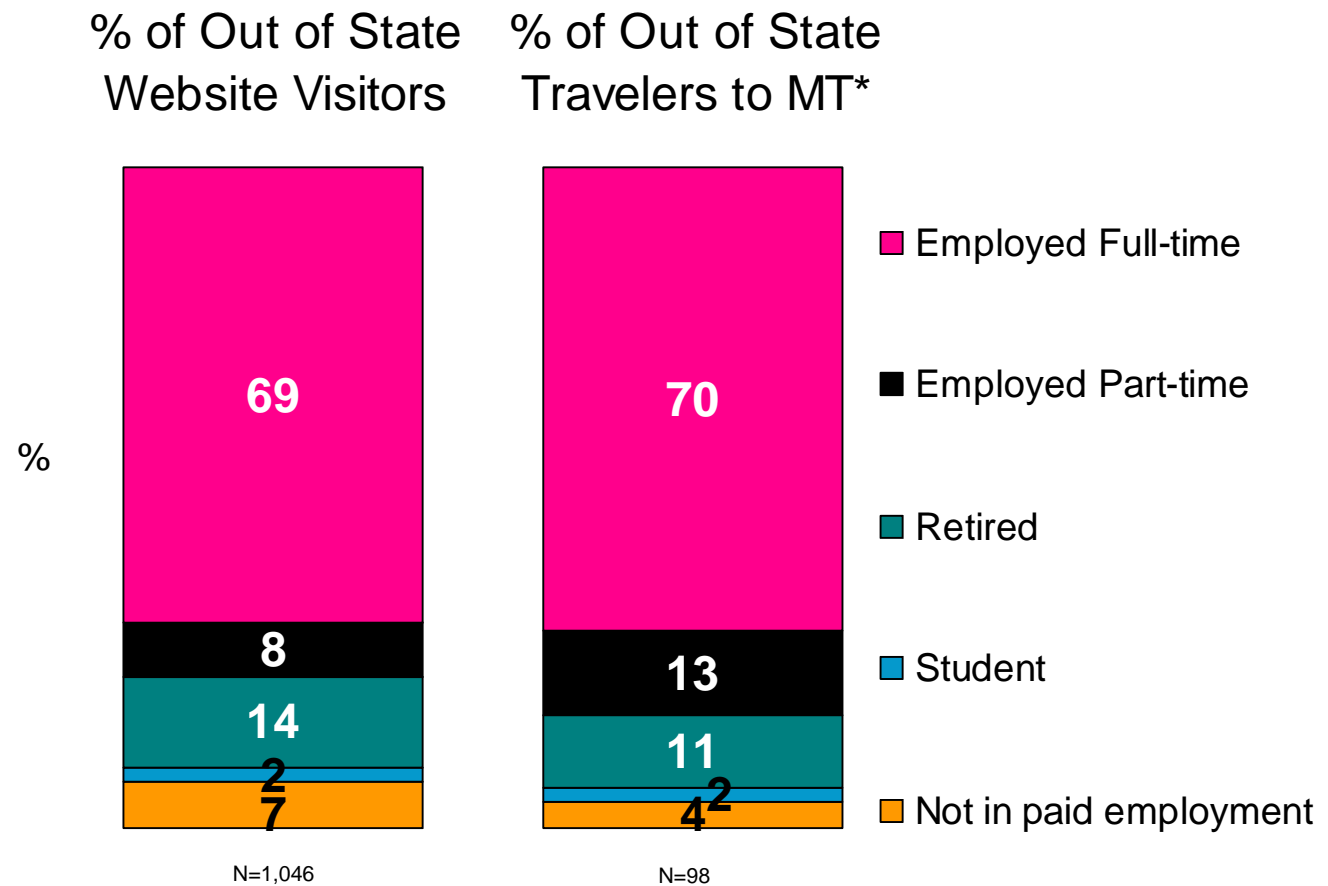
N=99

Q40: What is the highest level of education you have completed? (Select one)

*Participated in follow-up conversion study

Large majority are employed full-time

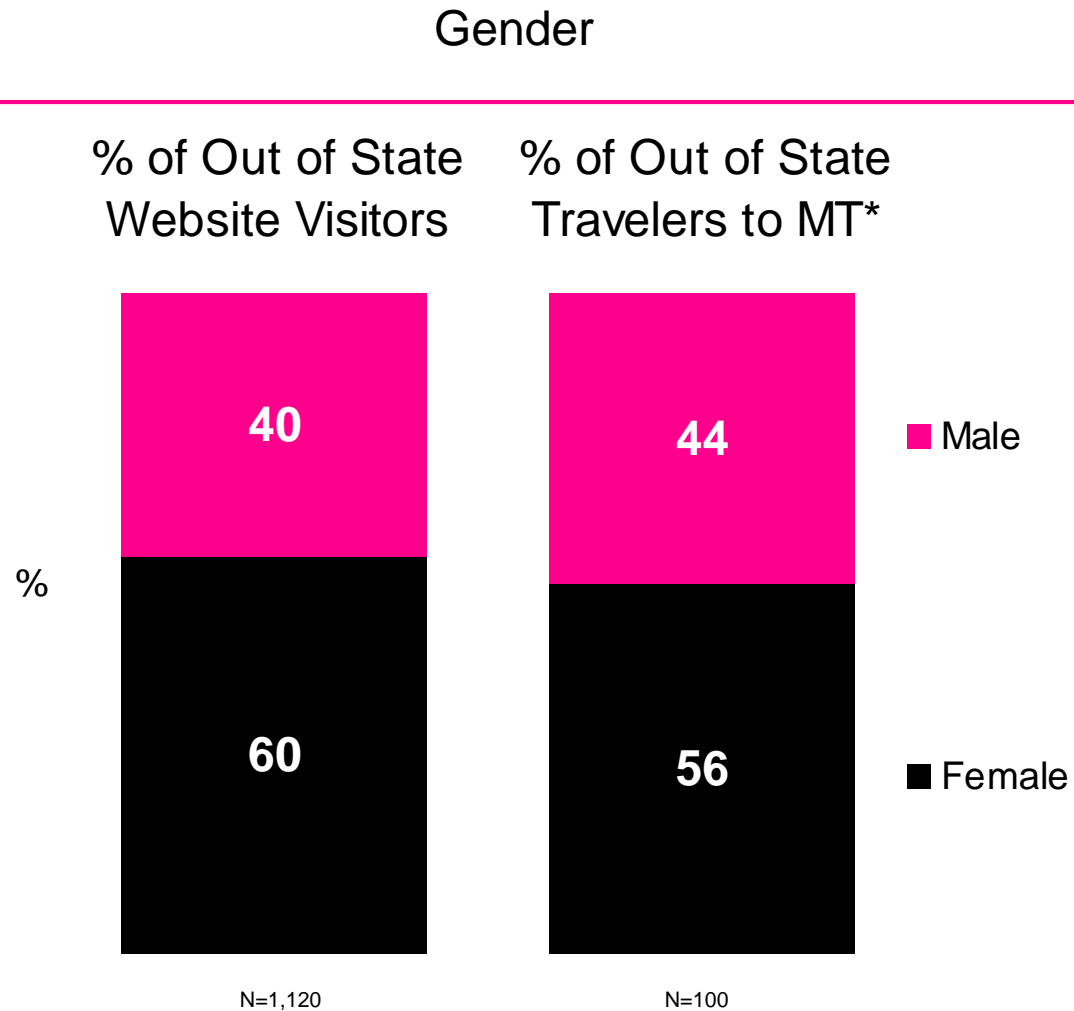
Employment Status



Q41: Which of the following best describes your current employment status? (Select one)

*Participated in follow-up conversion study

Women have a larger share of website visits



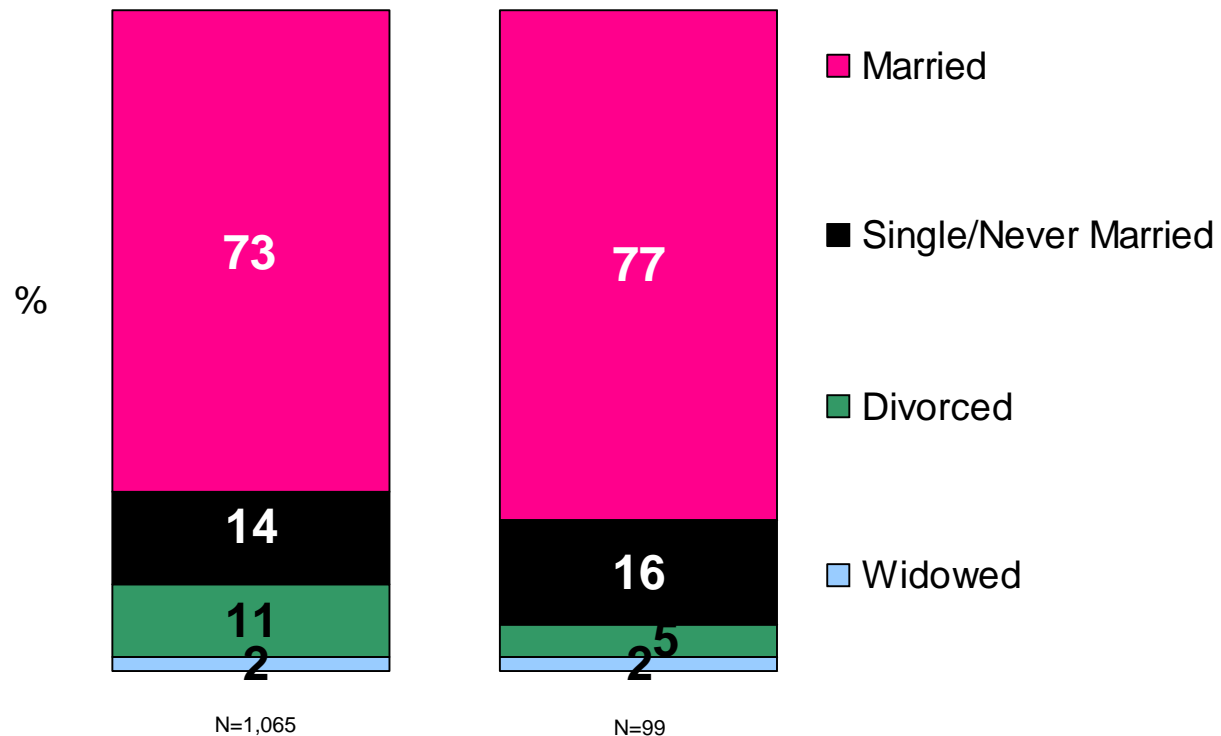
Q2: What is your gender? (Select one)

*Participated in follow-up conversion study

Large majority are married

Marital Status

% of Out of State Website Visitors % of Out of State Travelers to MT*



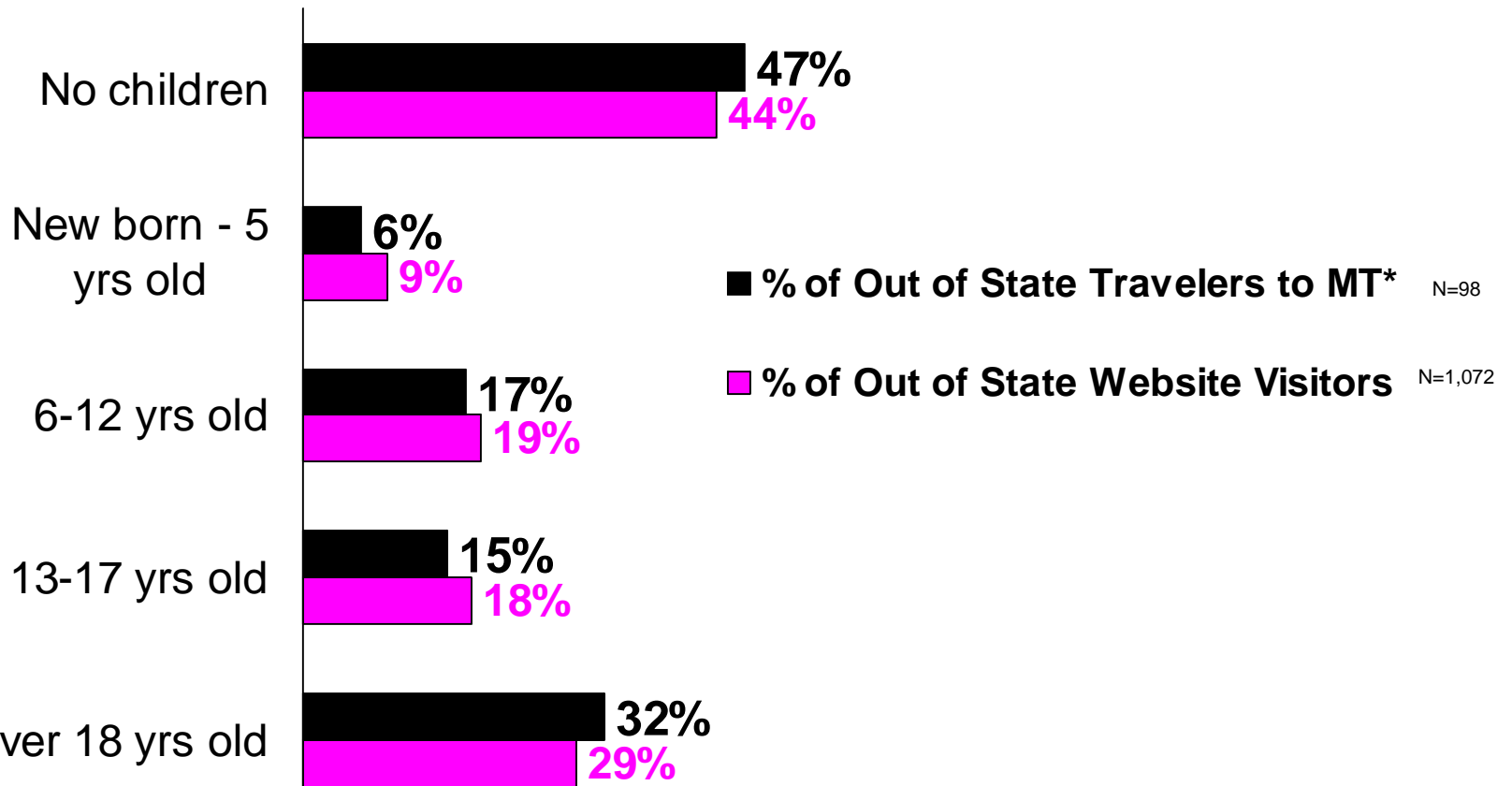
Q36: What is your marital status? (Select one)

*Participated in follow-up conversion study

Large majority have either no children or adult children living at home

Children in Household

% of Out of State Website Visitors

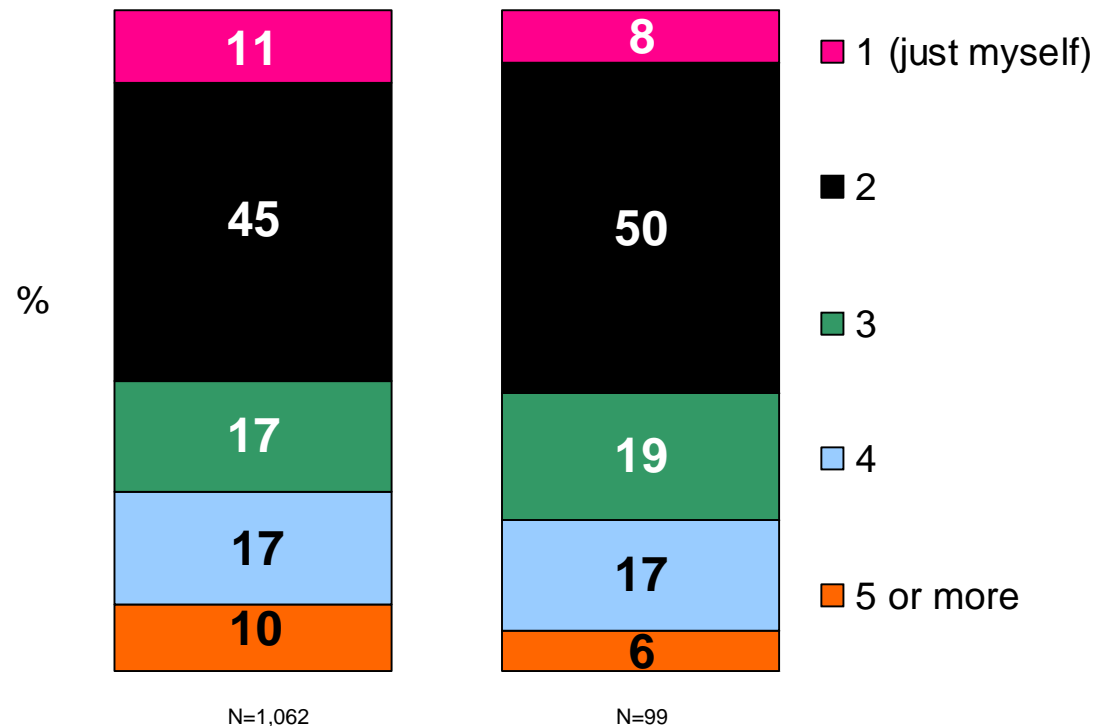


Q37: Please indicate whether you have any children in the following age groups living in your household. (Select all)
*Participated in follow-up conversion study

Vast majority live with at least one other person

Household Size

% of Out of State Website Visitors % of Out of State Travelers to MT*



Q38: How many people live in your household, including yourself? (Select one)

*Participated in follow-up conversion study

Typical Travel Profile of ...Website Visitors and Actual Travelers to MT...

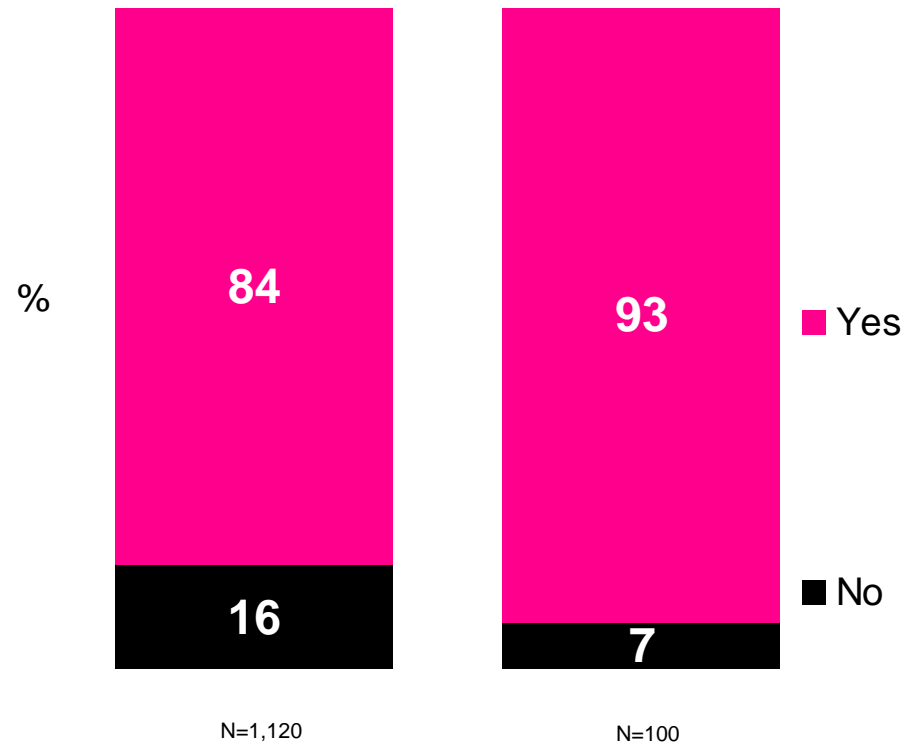


Large majority took an out of state trip in the past year

A larger share of Travelers to MT have taken a long-distance trip prior to traveling to MT this summer

During the past 12 months, did you take any trips of 200 miles or more that took you outside of your home state or province?

% of Out of State Website Visitors % of Out of State Travelers to MT*



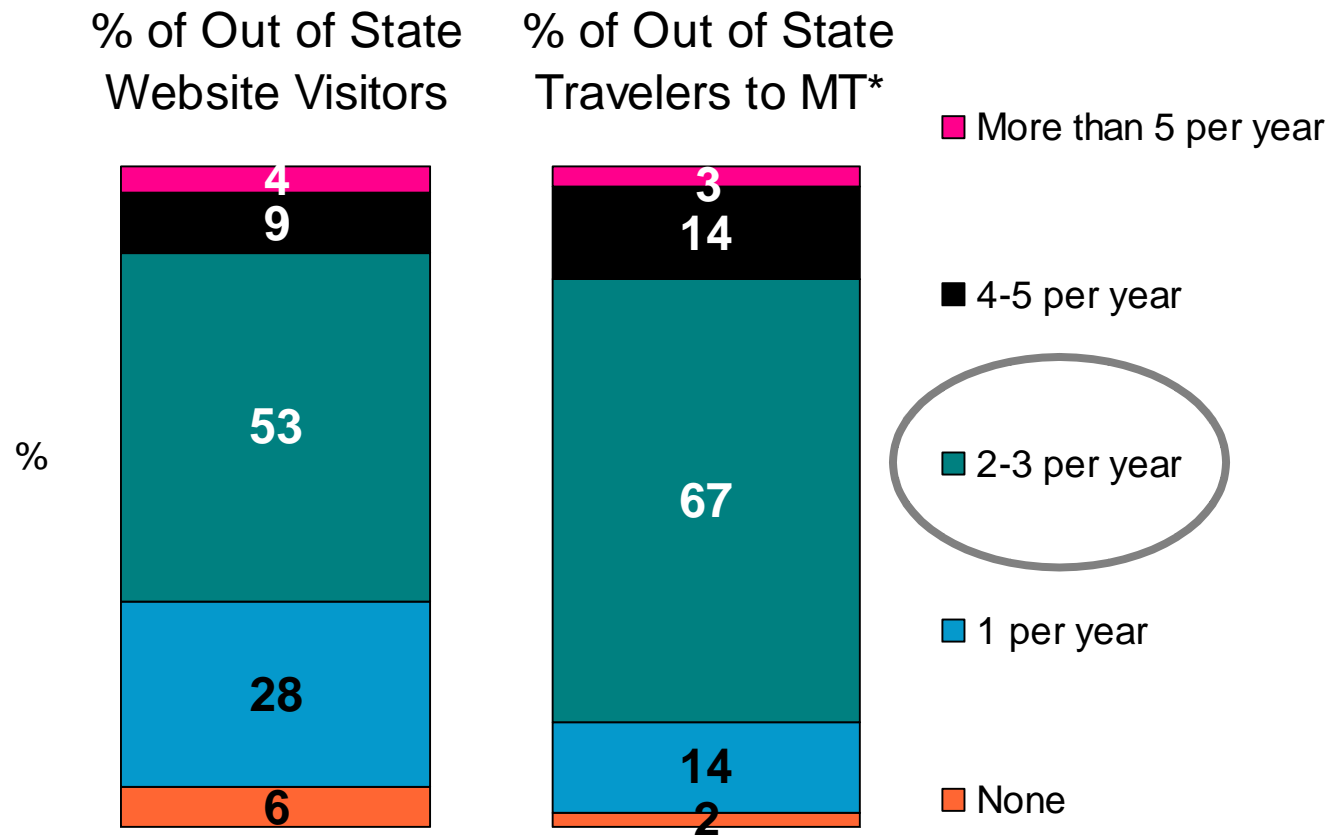
Q15: During the past 12 months, did you take any trips of 200 miles or more that took you outside of your home state or province? (Select one)

*Participated in follow-up conversion study

Most Website Visitors take between 1 to 3 vacations or leisure trips per year

A larger share of Travelers to MT typically take 2-3 trips per year

How many vacations or leisure trips do you typically take per year?



N=1,120

N=100

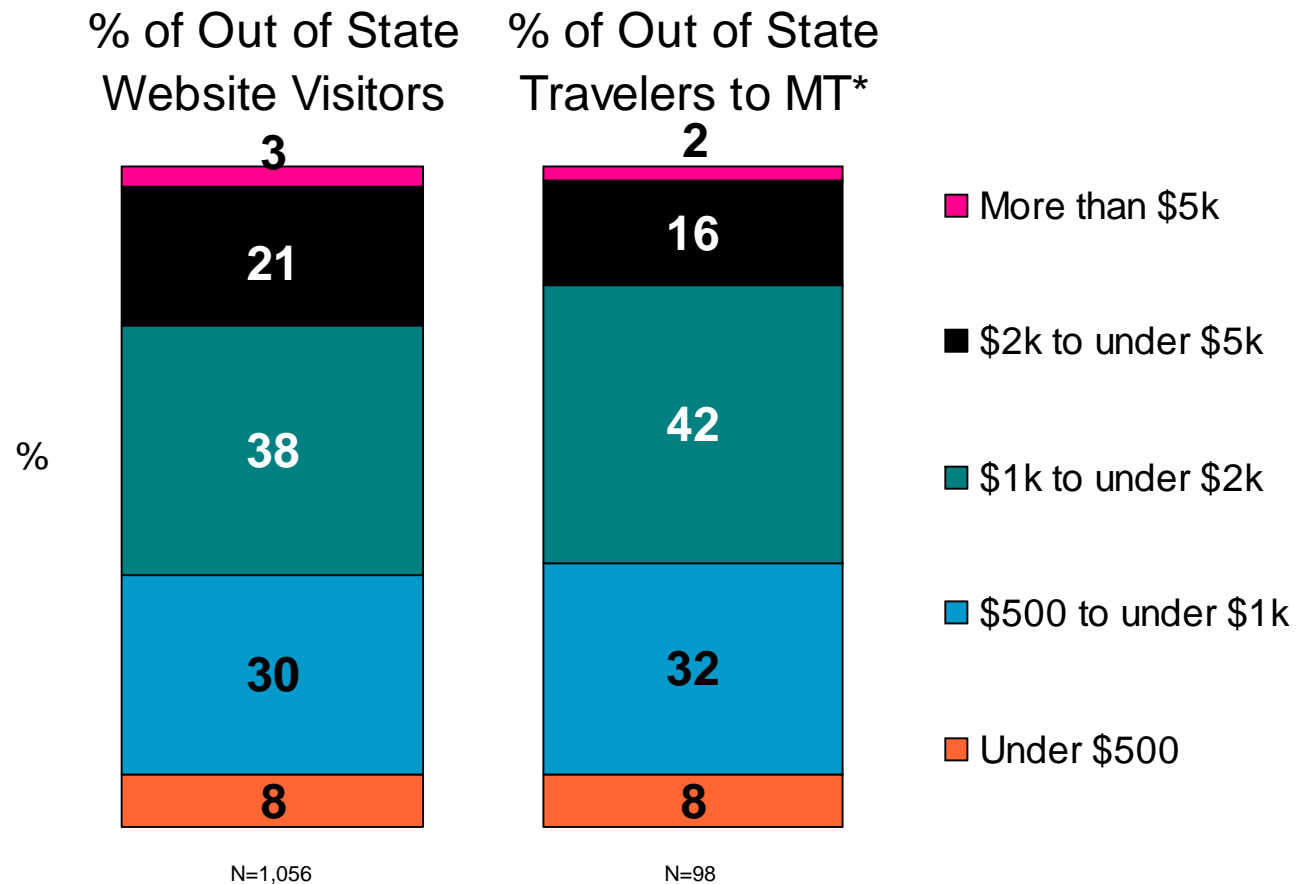
Q21: How many vacations or leisure trips do you typically take per year? (Select one)

*Participated in follow-up conversion study

\$1,000 to under \$2,000 is typically spent

Travelers to MT spend nearly the same as Website Visitors

How Much Do Website Visitors Typically Spend on a Trip?



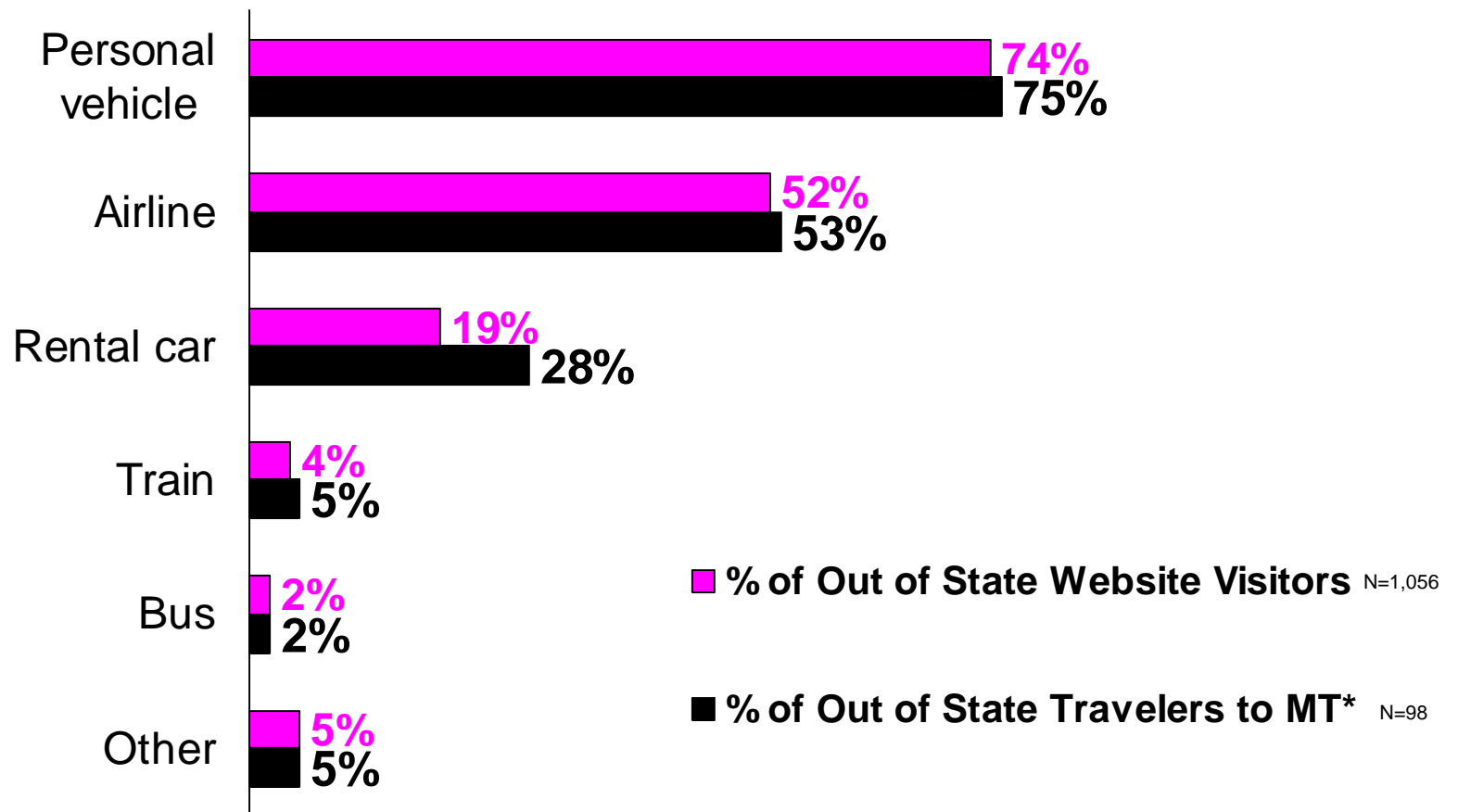
Q25: How much do you typically spend on a single vacation or leisure trip? Do not include transportation costs to and from the destination. (Select one)

*Participated in follow-up conversion study

Large majority typically drive and half fly

A larger proportion of Travelers to MT typically use rental cars

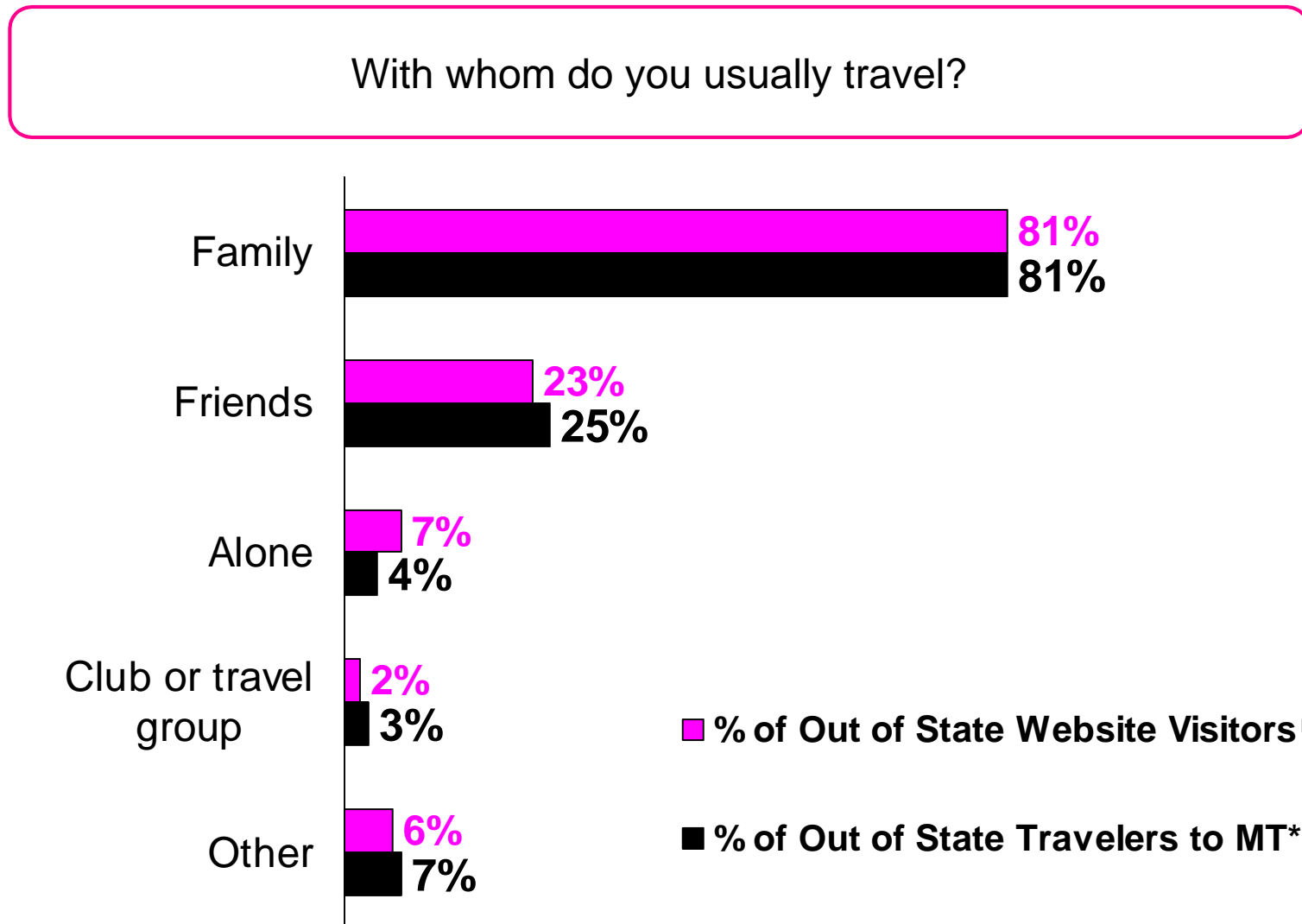
How do you typically travel to your destinations?



Q22: How do you typically travel to your destinations? (Select one)

*Participated in follow-up conversion study

Vast majority of both Website Visitors and Travelers to MT travel with their family

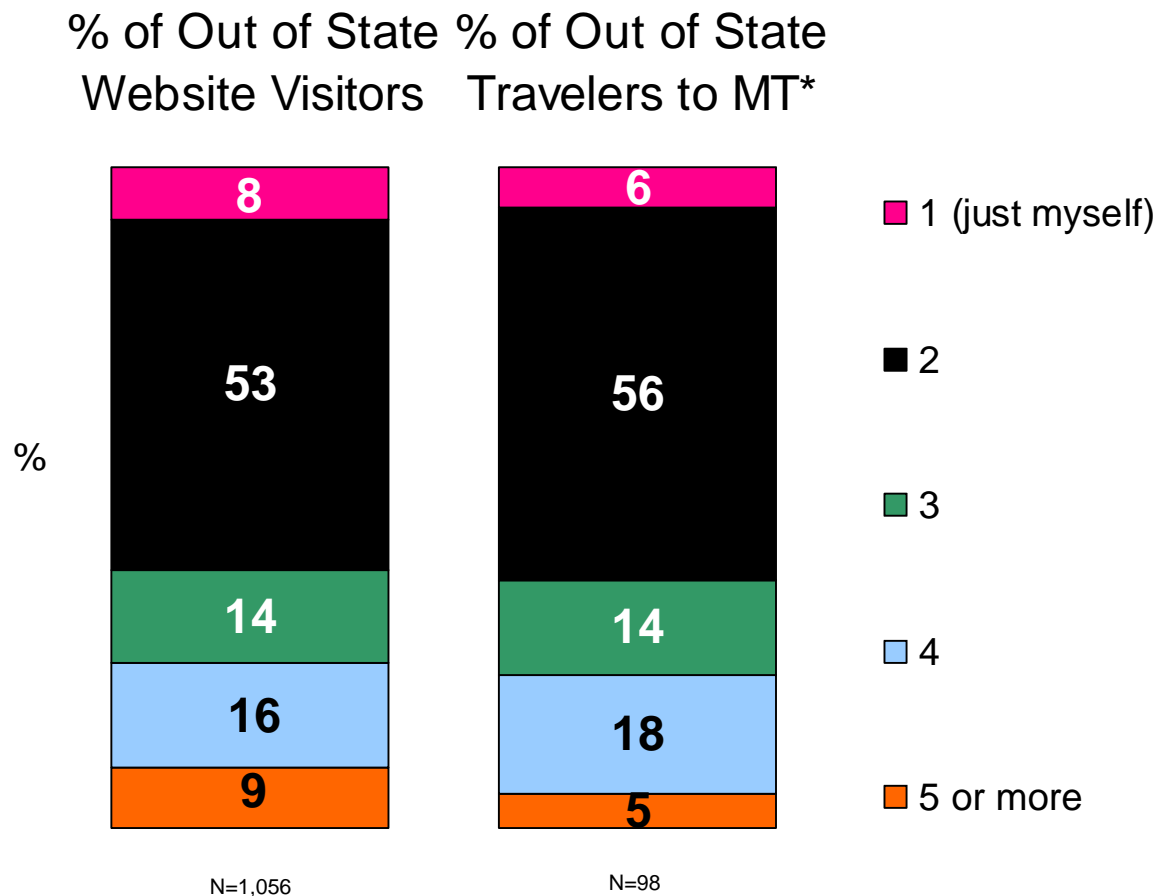


Q24: With whom do you usually travel? (Select one)

*Participated in follow-up conversion study

The majority of both Website Visitors and Travelers to MT travel with at least a companion

How many people do you usually travel with, including yourself?



Q23: How many people do you usually travel with, including yourself? (Select one)

*Participated in follow-up conversion study

Past vacation
behaviour in MT

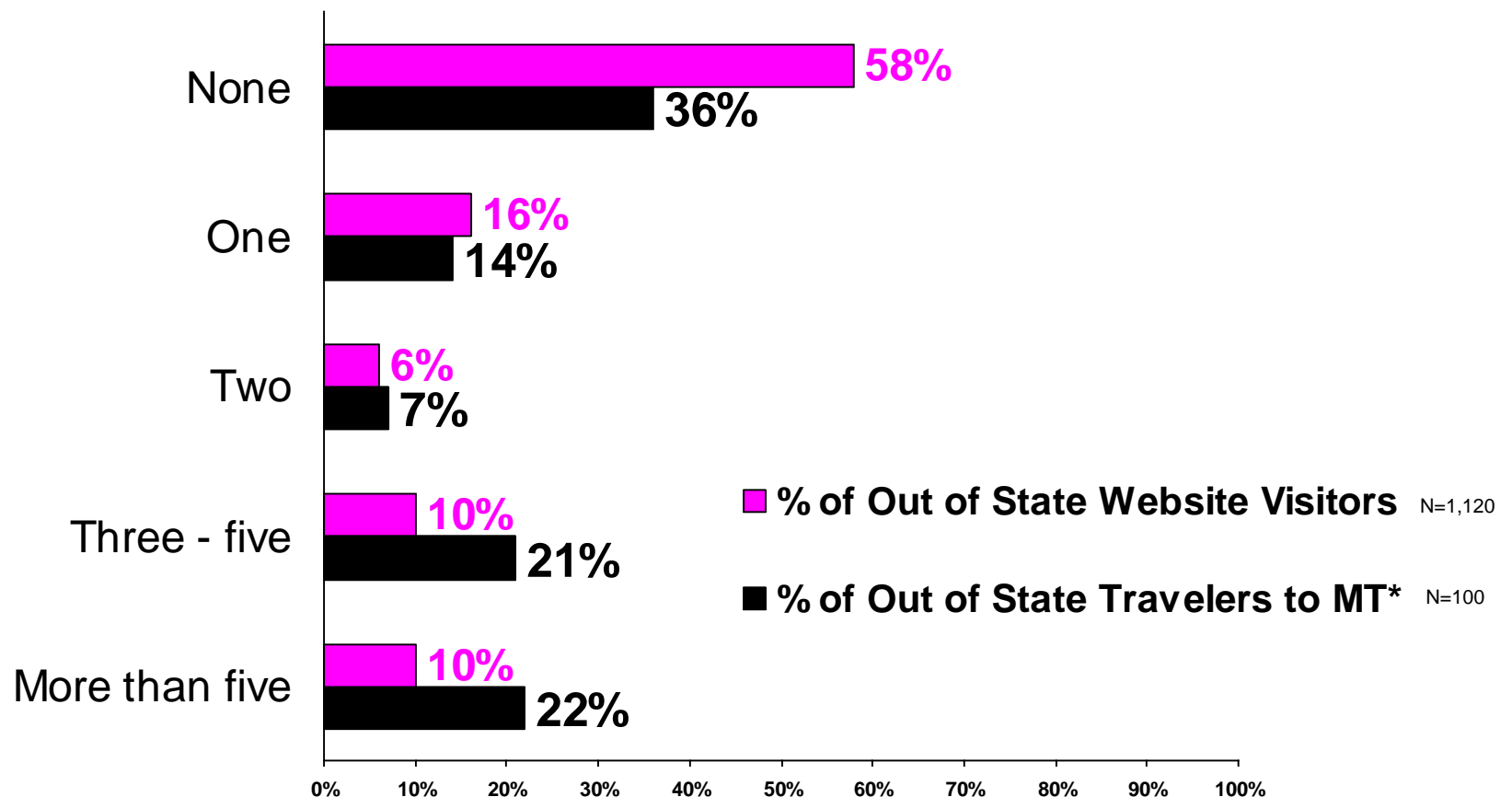
...among Website
Visitors and Actual
Travelers...



Majority of Website Visitors never vacationed in MT

Two-thirds of Travelers to MT have vacationed in MT in the past, many frequently

How many vacations or leisure trips have you ever had in Montana?



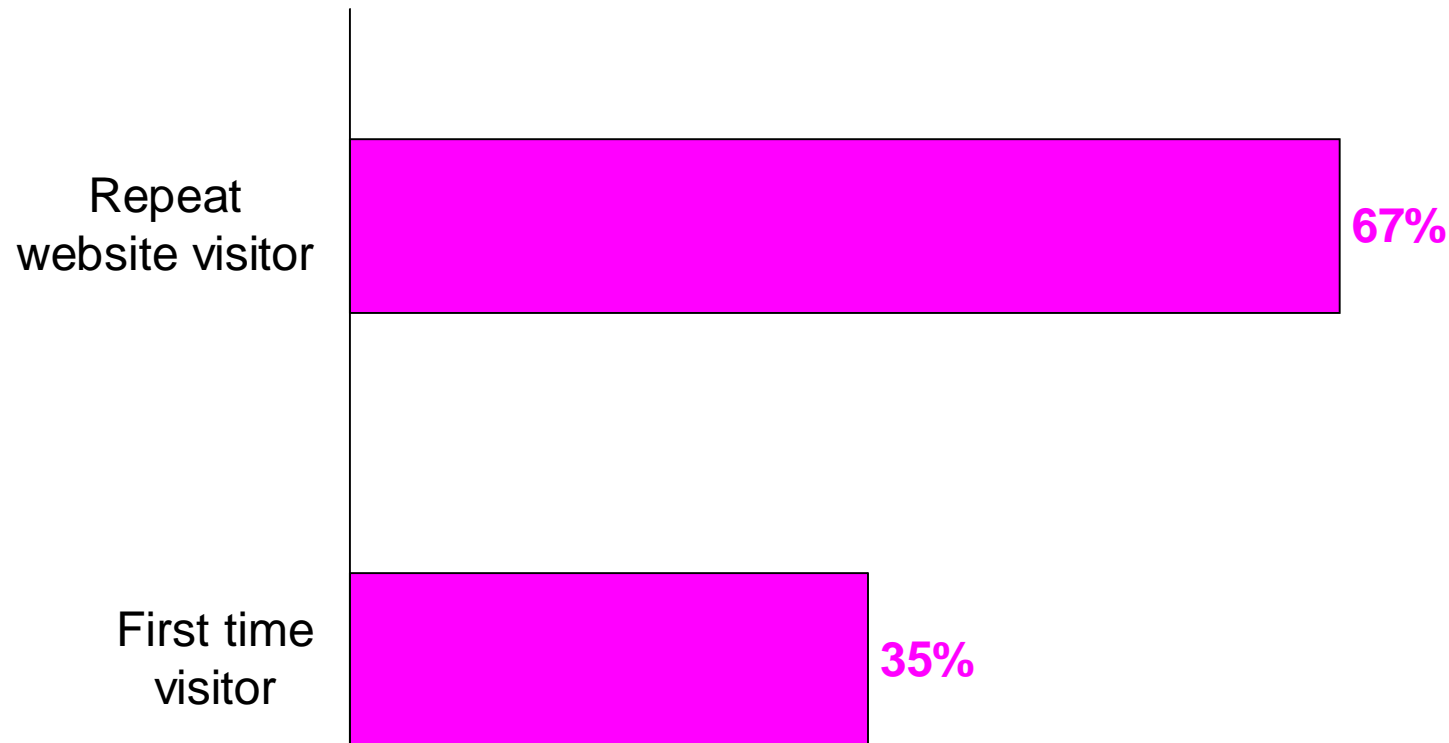
Q8: How many vacations or leisure trips have you ever had in Montana? (Select one)

*Participated in follow-up conversion study

Large majority of repeat website visitors had visited MT

How many vacations or leisure trips have you ever had in Montana?

% of Out of State Website Visitors

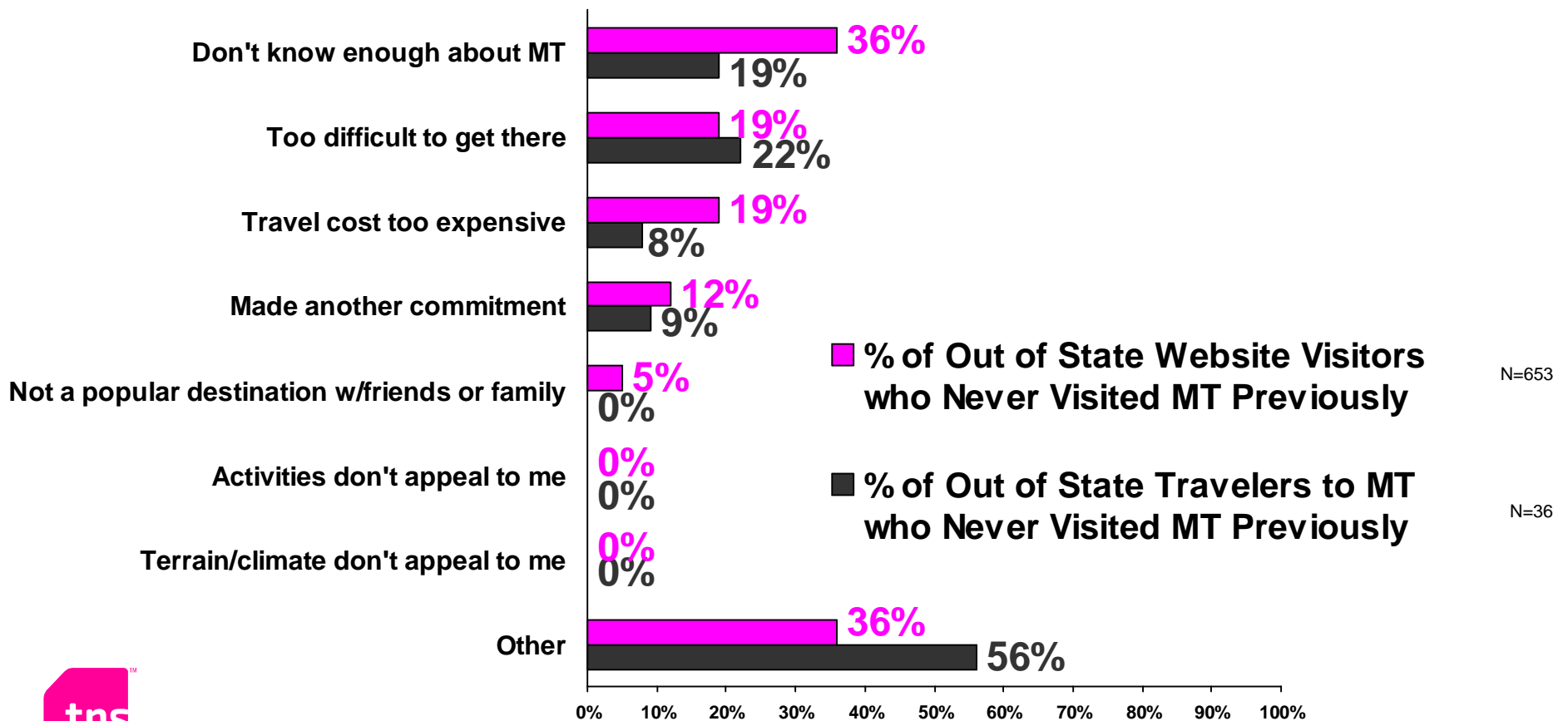


N=1,120

Q8: How many vacations or leisure trips have you ever had in Montana? (Select one)

Website provides opportunity to overcome #1 obstacle

Why Haven't They Visited Montana Yet?



Q14: Which of the following statements best describes the reasons why you have not visited Montana? (Select one)

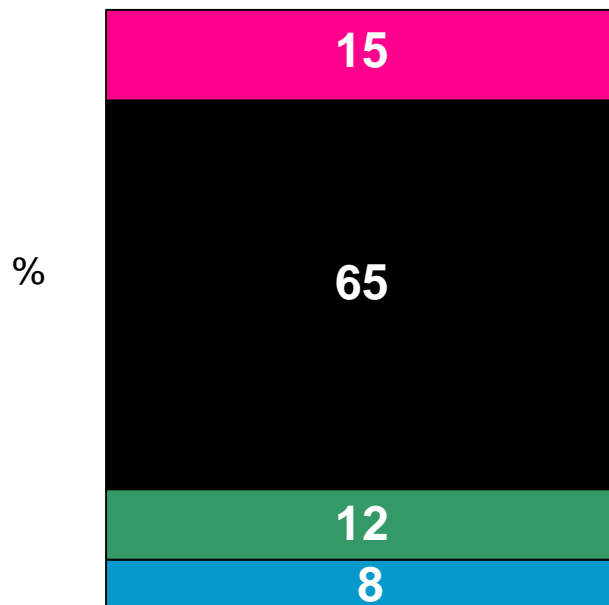
*Participated in follow-up conversion study. Caution: very small base size N=36.



Large majority's last vacation was in summer

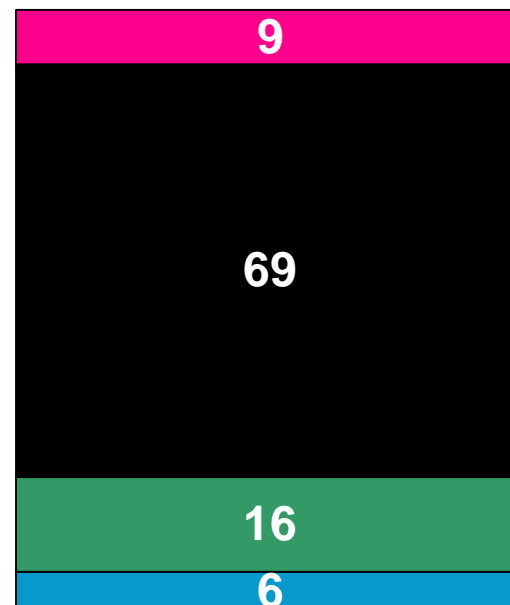
What time of year did you travel in Montana on your last vacation or leisure trip?

% of Out of State Website Visitors, when they vacationed in MT in the past



N=467

% of Out of State Travelers to MT*, when they previously vacationed in MT



N=64

- Spring
- Summer
- Fall
- Winter

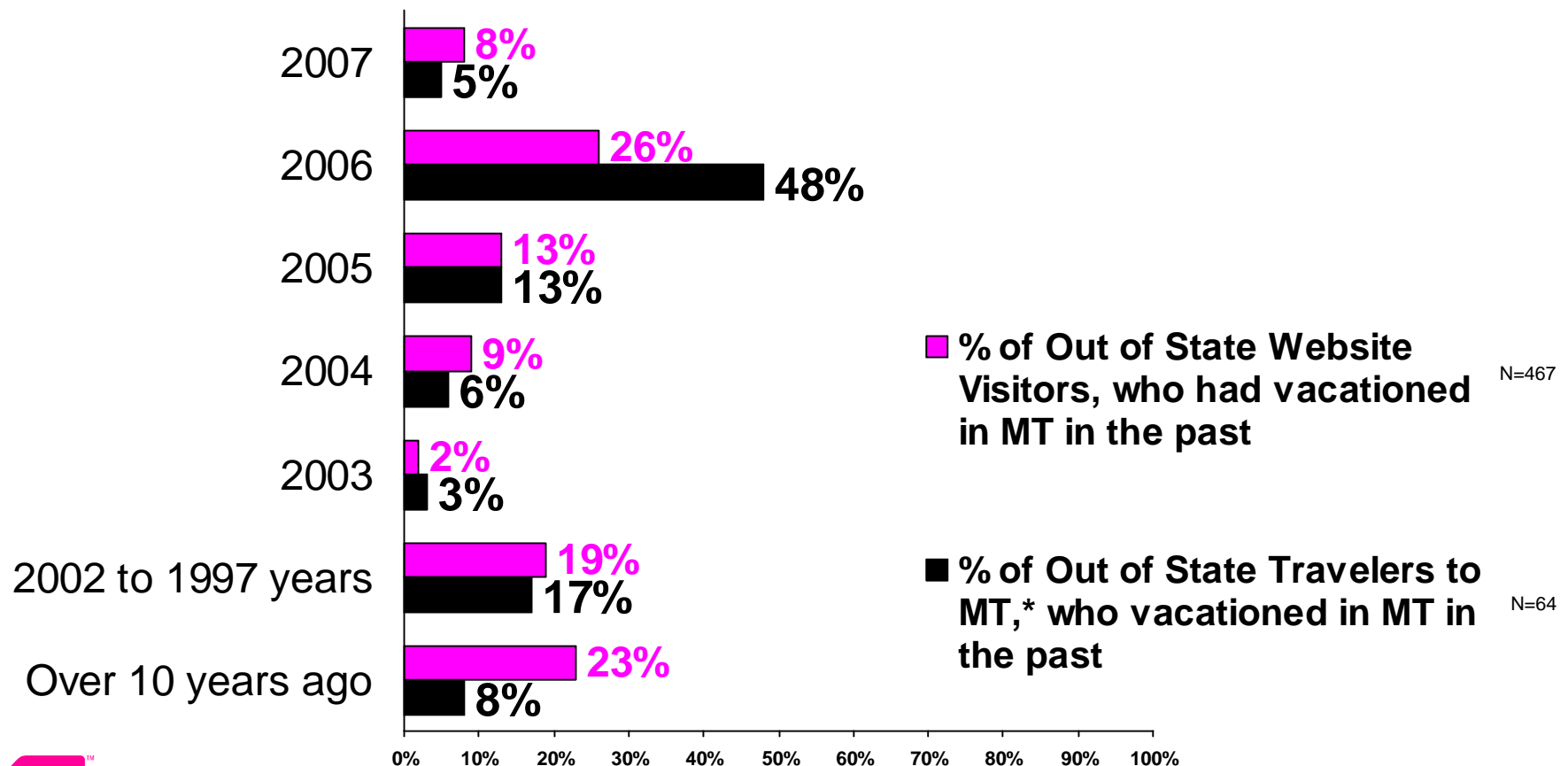


Q12: What time of year did you travel in Montana on your last vacation or leisure trip? (Select one)

*Participated in follow-up conversion study.

Prior to this summer, three-quarters of Travelers to MT have last visited MT within the past 5 years, nearly half in '06

In what year did they last take a vacation or leisure trip in Montana?

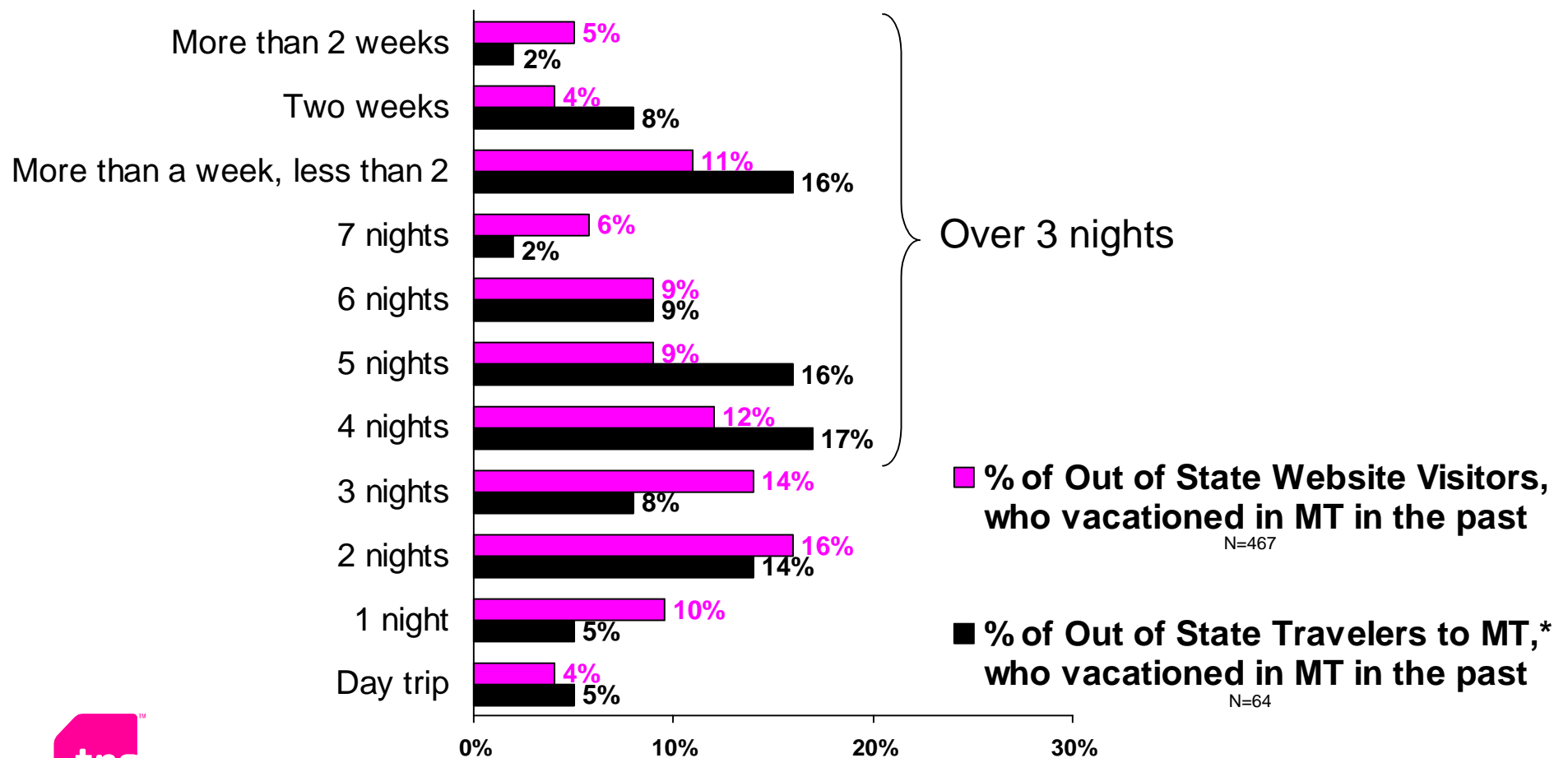


Q10: In what year did you last take a vacation or leisure trip in Montana? (Select one)

*Participated in follow-up conversion study.

Over half of Website Visitors and 70% of Travelers to MT had previously vacationed more than 3 nights in MT

How many nights in Montana did you stay on your last vacation or leisure trip in Montana?

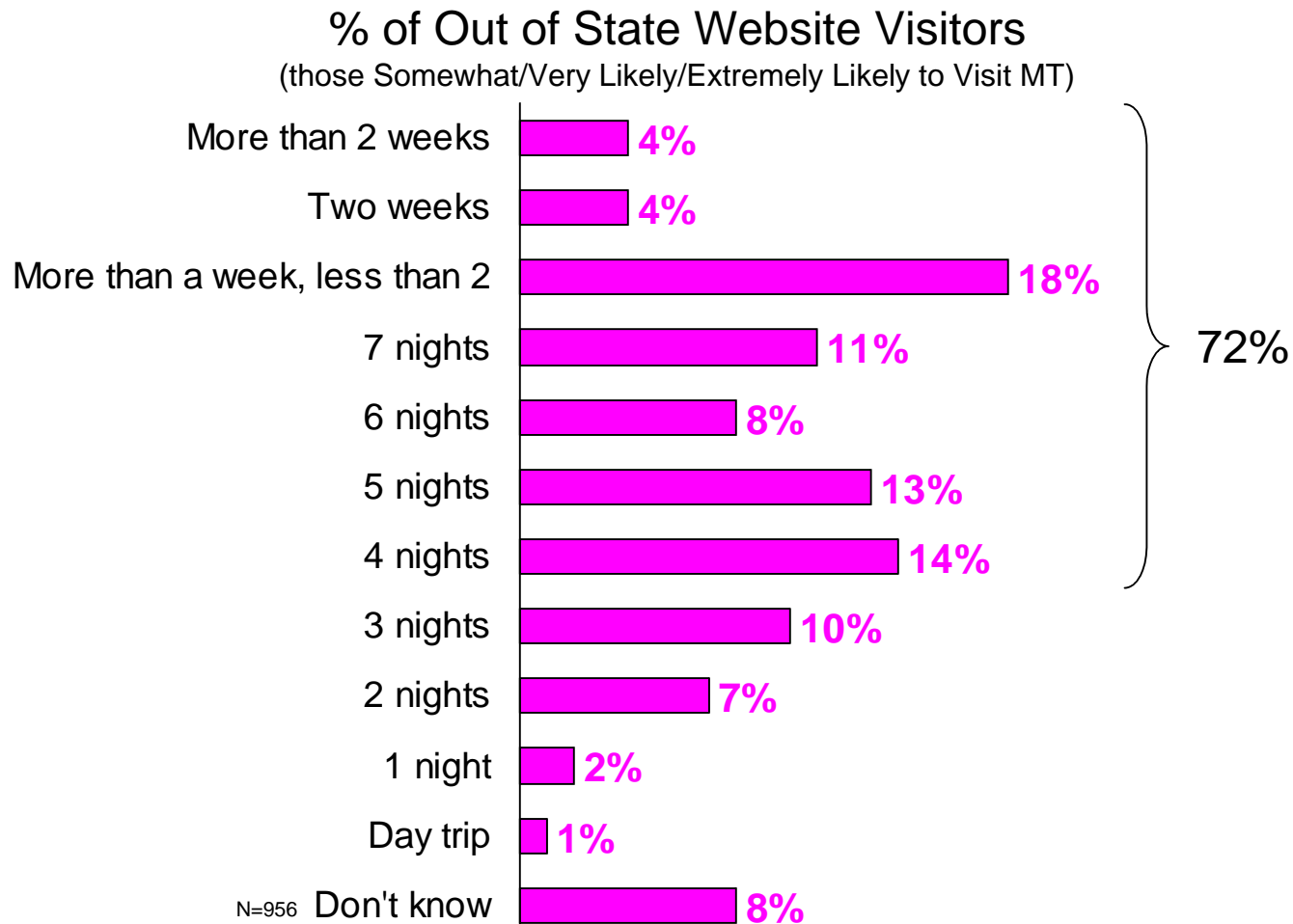


Q11: How many nights in Montana did you stay on your last vacation or leisure trip? (Select one)

*Participated in follow-up conversion study.

Those likely to visit MT intend to stay longer than previous visitors to MT (72% vs. 56% respectively will stay over 3 nights)

If you plan to take a vacation or leisure trip Montana, how many nights do you plan to stay in Montana?



N=956

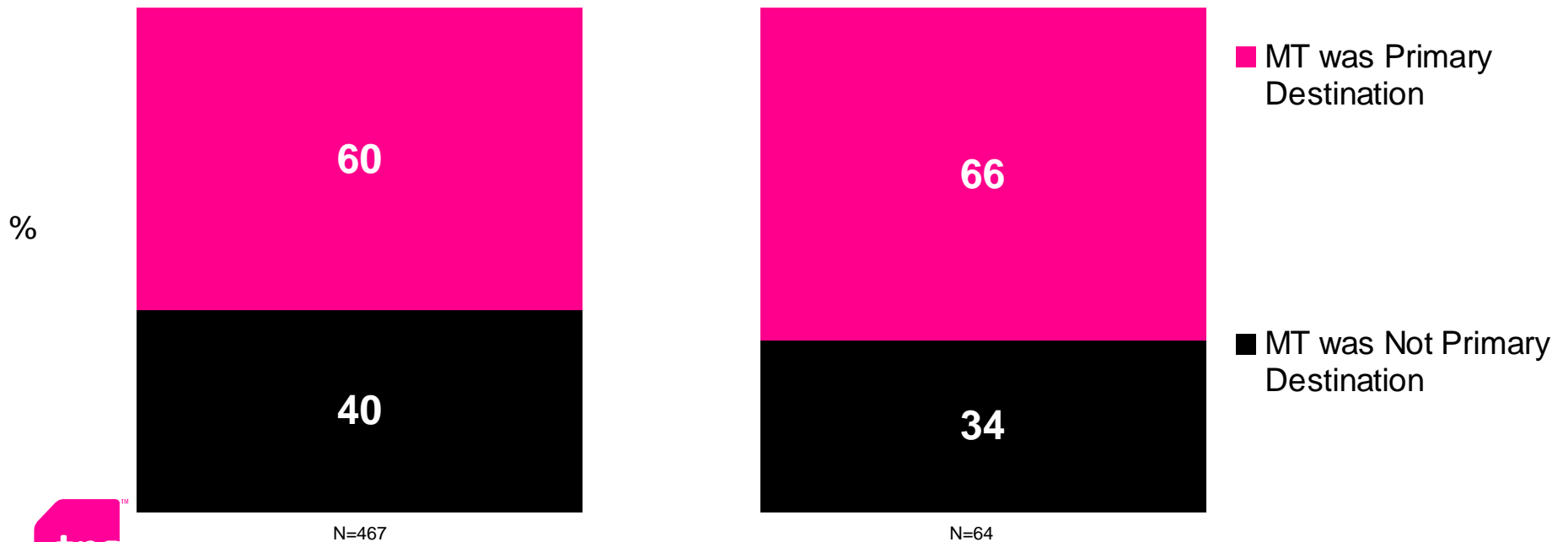
Q18A: If you plan to take a vacation or leisure trip in Montana, how many nights do you plan to stay in Montana? (Select one)

MT was the primary destination for the majority of previous Website Visitors and Travelers to MT

Was Montana your primary vacation destination on your last trip?

% of Out of State Website
Visitors who vacationed in MT in
the past

% of Out of State Travelers to
MT,* who vacationed in MT in the
past



Q13: Was Montana your primary vacation destination? (Select one)

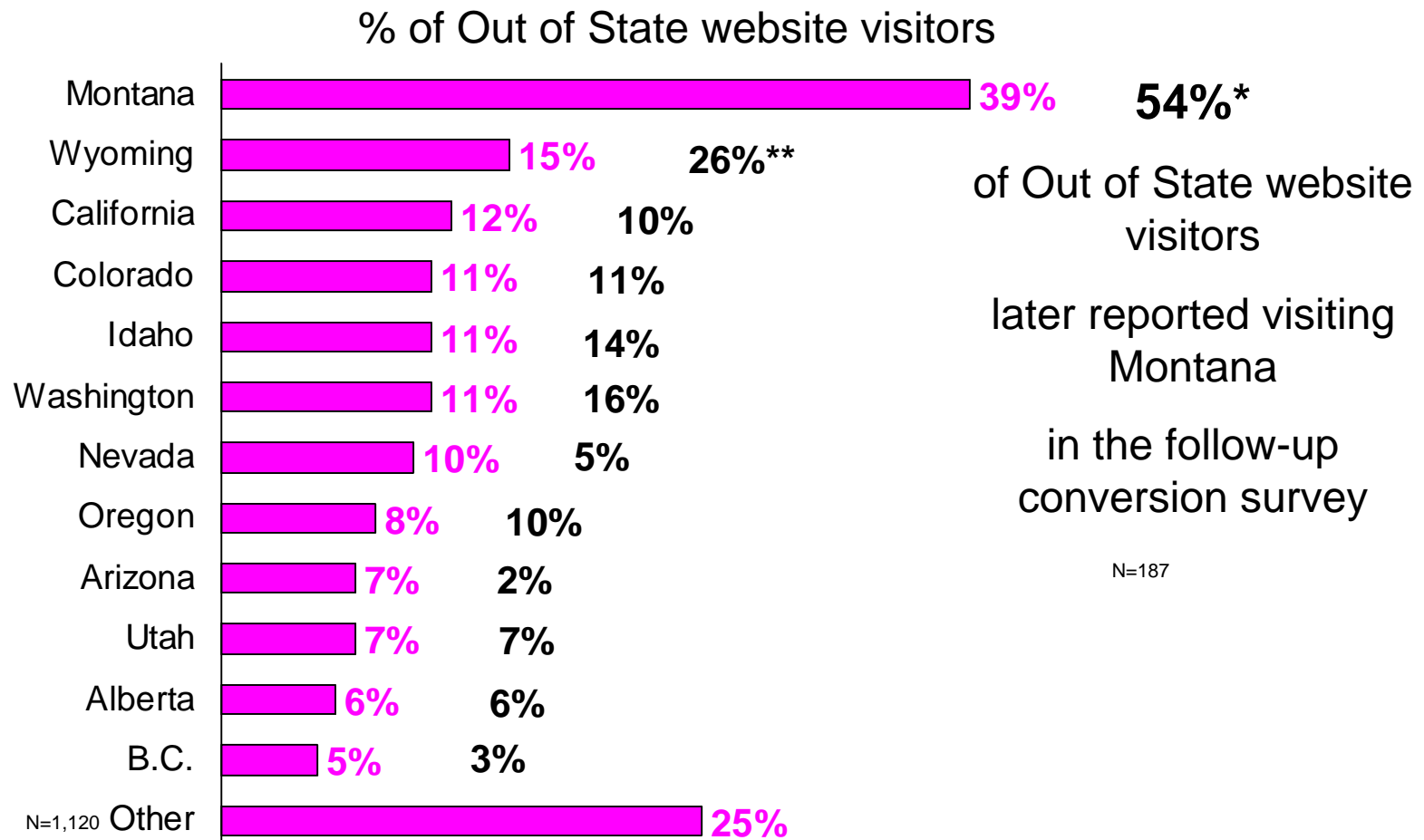
*Participated in follow-up conversion study.

Travel Intent among Website Visitors...

Over twice as many website visitors are interested in visiting MT than other nearby states

Over twice as many website visitors actually visited MT than other nearby states

How Many Said They Are “Extremely Likely” to Visit a State?

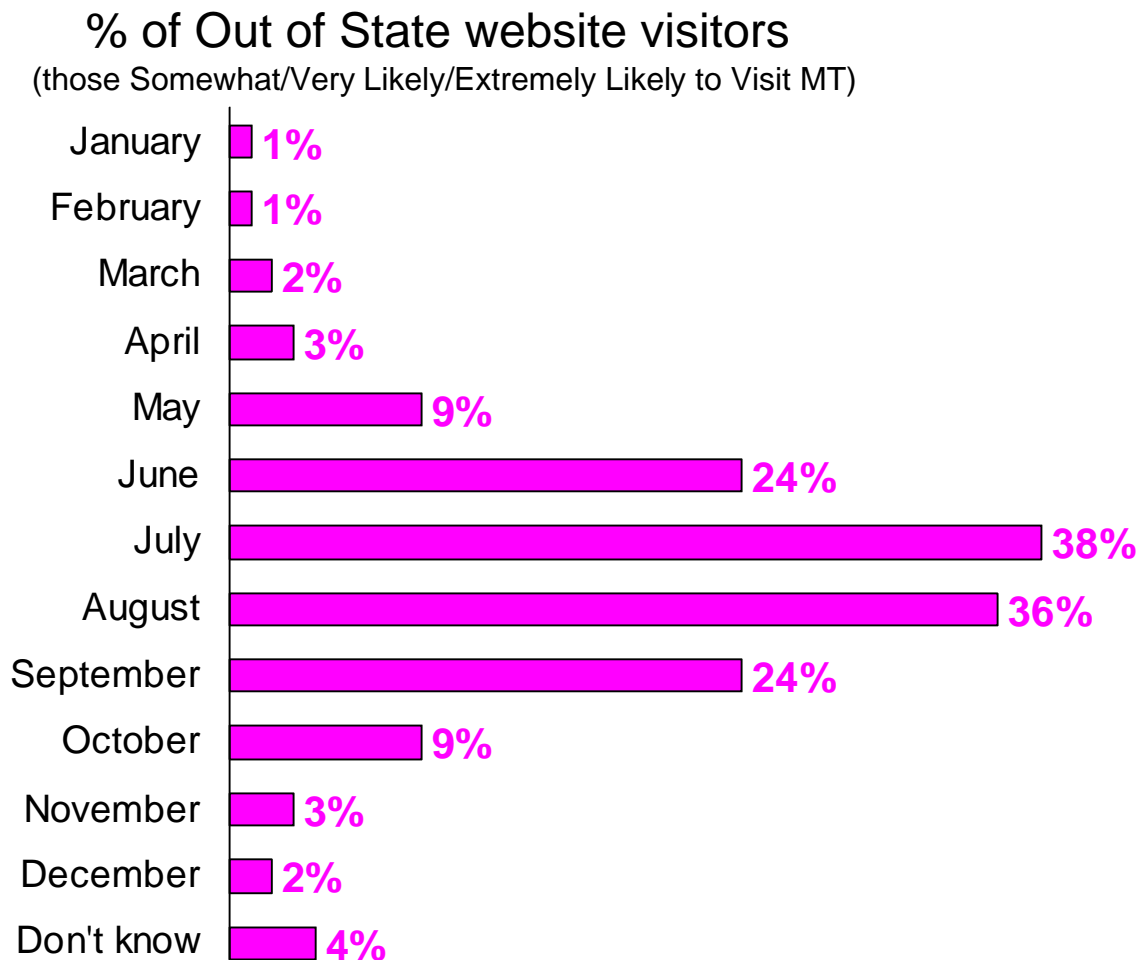


Q16: How likely are you to take a vacation or leisure trip in the following states or provinces in the next 12 months? (Select one each)

*N=187; Q3 Recontact: Did you take any leisure trips or vacations in Montana this summer (May-September 2007). **Q5 Recontact: Where did you take a leisure trip or vacation this summer?

July and August are the most likely travel months

If you plan to take a vacation or leisure trip in Montana, when are you likely to go?



N=956

Q17a: If you plan to take a vacation or leisure trip in Montana, when are you likely to go? (Select all)

Activities to emphasize

What would be the Primary Purpose of Visiting Montana?

	Primary Activities	Would Like to Do
Net (National & State Parks)	77%	94%
Visiting National Parks	71%	90%
Scenic sight seeing on my own, without a tour group or guide	67%	86%
Natural landmarks like Caverns, Geysers, and Glaciers	63%	84%
Visiting State Parks	55%	82%
Historic sites/Museums/Ghost Towns	47%	78%
Wildlife watching	48%	77%
Day hiking	36%	69%
Native American culture/PowWows/Indian Nations/Native Art	27%	63%
Shopping	22%	61%
Hot springs/Water parks	26%	60%



N=956

Q19: Which of the following activities would you choose on a vacation or leisure trip in Montana? In addition, which of these activities would be your primary activities? (Select all)

Potential activities for image building or to grow interest in the activity

What would be the Primary Purpose of Visiting Montana?

	Primary Activities	Would Like to Do
Horseback riding	19%	56%
Dinosaurs/Archaeology	20%	56%
Cowboy culture/Ranches/Cattle drives/Rodeos	22%	55%
Breweries/Wineries	17%	54%
Fishing	21%	52%
Scenic sight seeing with a tour group or guide	19%	51%
Whitewater rafting/Kayaking	18%	50%
RV/Camping	23%	50%
Fine or Unique Dining	18%	49%
Canoeing	13%	47%
Theater/Musical events/Festivals	12%	46%
Antiques	12%	46%
Art galleries	10%	44%
Visiting family or friends	21%	44%



N=956

Q19: Which of the following activities would you choose on a vacation or leisure trip in Montana? In addition, which of these activities would be your primary activities? (Select all)

Lowest priority

What would be the Primary Purpose of Visiting Montana?

	Primary Activities	Would Like to Do
Nightlife	8%	40%
Overnight backpacking/Rock climbing/Mountaineering	10%	39%
Mountain Biking/Road Cycling	8%	39%
Spa/Health/Luxury resort	8%	39%
Casinos	9%	39%
Off-highway vehicle use	7%	36%
Golf	5%	35%
Recreational motor boating	6%	34%
Hand gliding/Sky diving/ Scuba diving/ Snorkeling	5%	33%
Weddings	2%	29%
Other	13%	34%



N=956

Q19: Which of the following activities would you choose on a vacation or leisure trip in Montana? In addition, which of these activities would be your primary activities? (Select all)

Image among ...Website Visitors and Actual Travelers to MT...

Vast majority of website visitors agree that Montana fits the tested image statements.

Perceptions of Montana

% who think Montana fits the statement from among Out of State website visitors who are Somewhat likely, Very likely, or Extremely likely to visit the state

+ significant difference exists at 95% confidence	Total Travelers to MT*	Total Website Visitors	Repeat Site Visitor	1 st Time Site Visit	1 st Time ENTER	1 st Time EXIT
Has beautiful scenery	97%	97 %	98 %	97 %	96 %	98 %
Is for people with a sense of adventure	92	95	93	95	93	96
Offers a friendly, small town charm	98	94	96	93	93	93
Offers an authentic Western experience	94	93	95	93	92	93
Is a place about which you have heard positive things	97	93	96	92	91	92
Is family oriented	93	92	95	91	91	91
Offers a wide variety of activities	90	89	92	88	87	89
Is a good value for the money	86	80	87+	78	77	79
Offers easy travel to your areas of interest, once you are in the state	80	77	82+	75	72	77
Is an easy place to travel to	64	62	68	61	63	59

N=98

N=956

N=221

N=735

N=288

N=447

Q20: We would like your general perceptions of the below destinations regarding vacations and leisure trips. It does not matter whether you have ever visited or not, we would like your impressions. Please select the vacation destination, if any, that you think <statement>. (Select all). *Participated in follow-up survey and said likely to travel in MT in the next 12 months during the intercept survey.

Wyoming also has a strong fit with 'Authentic Western Experience'

Perceptions of Destinations

% who think the destination fits the statement from among Out of State website visitors who are Somewhat likely, Very likely, or Extremely likely to visit the state

Significant testing at 95% confidence:



Higher than MT



Same as MT



Lower than MT

%	MT	WY	CO	ID	CA	NV	WA	AZ	UT	OR	BC	AB
Base size (N)	956	581	485	436	414	414	373	361	347	354	255	205
Has beautiful scenery	97	92	93	88	82	67	88	83	85	92	93	85
Is for people with a sense of adventure	95	90	90	80	69	67	74	74	80	80	85	79
Offers a friendly, small town charm	94	87	70	81	38	46	61	58	65	72	65	68
Offers an authentic Western experience	93	92	64	50	29	52	25	66	49	37	31	60
Is a place about which you have heard positive things	93	85	88	82	74	73	81	83	78	82	86	83
Is family oriented	92	85	87	80	75	51	77	75	80	81	79	78
Offers a wide variety of activities	89	82	89	77	91	78	82	81	76	83	83	81
Is a good value for the money	80	74	56	67	37	56	57	60	62	62	56	57
Offers easy travel to your areas of interest, once you are in the state	77	75	76	70	71	68	72	73	72	73	68	70
Is an easy place to travel to	62	60	74	64	76	70	65	69	65	67	63	59

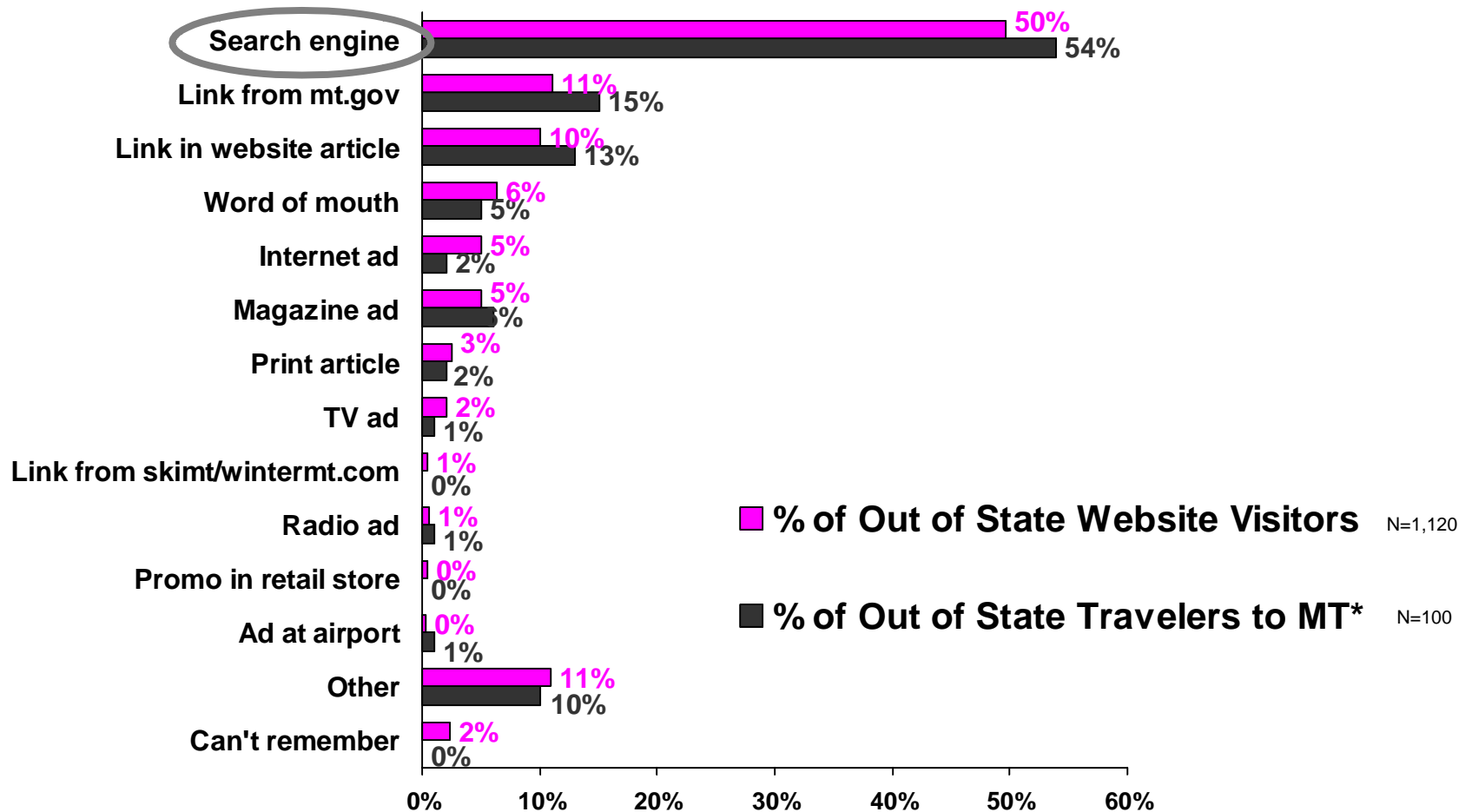
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Website Usage among ...Website Visitors and Actual Travelers to MT...



Internet Search is key

How Do They Become Aware of the Website?

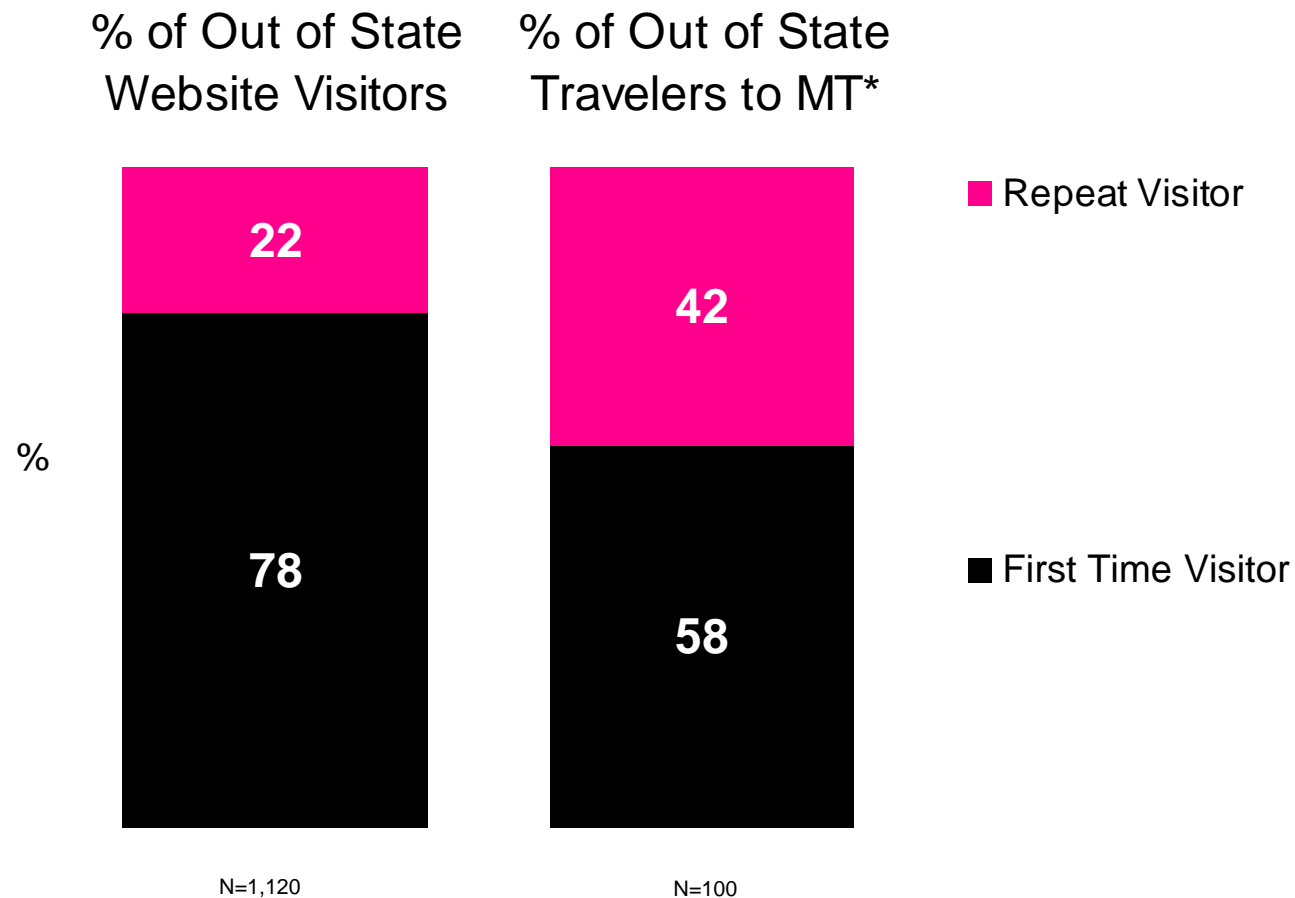


Q6: How did you first become aware of this website? (Select all)

*Participated in follow-up conversion study.

Majority of Travelers to MT were first time visitors in the initial intercept survey
Repeat visitors comprise a disproportionate share of Travelers to MT, indicating a higher travel conversion rate

How Many were First Time Website Visitors?

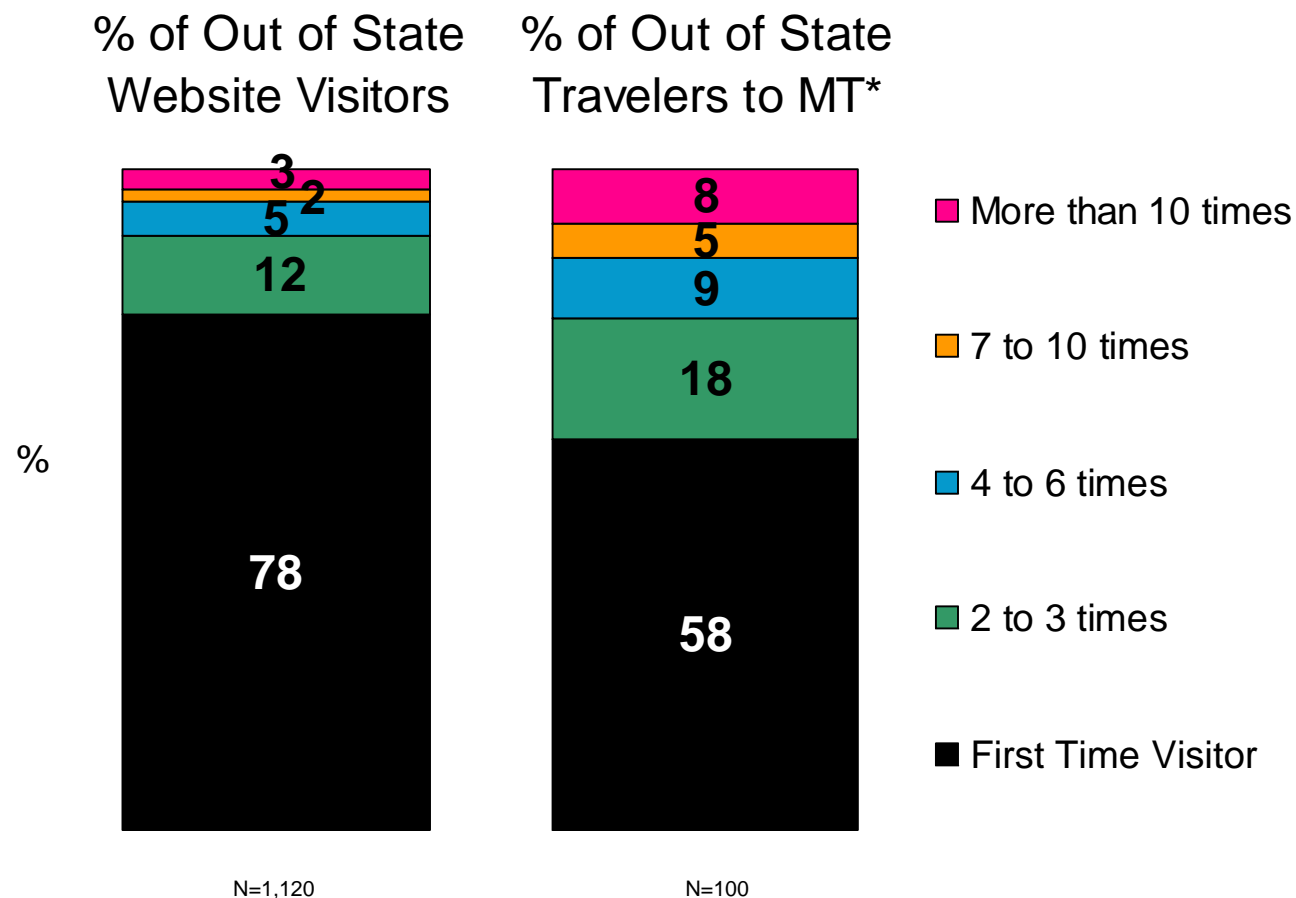


Q4: Is this your first visit to this website? (Select one)

*Participated in follow-up conversion study.

Repeat site usage is nearly double among Travelers to MT, when first surveyed

How Many were First Time Website Visitors?

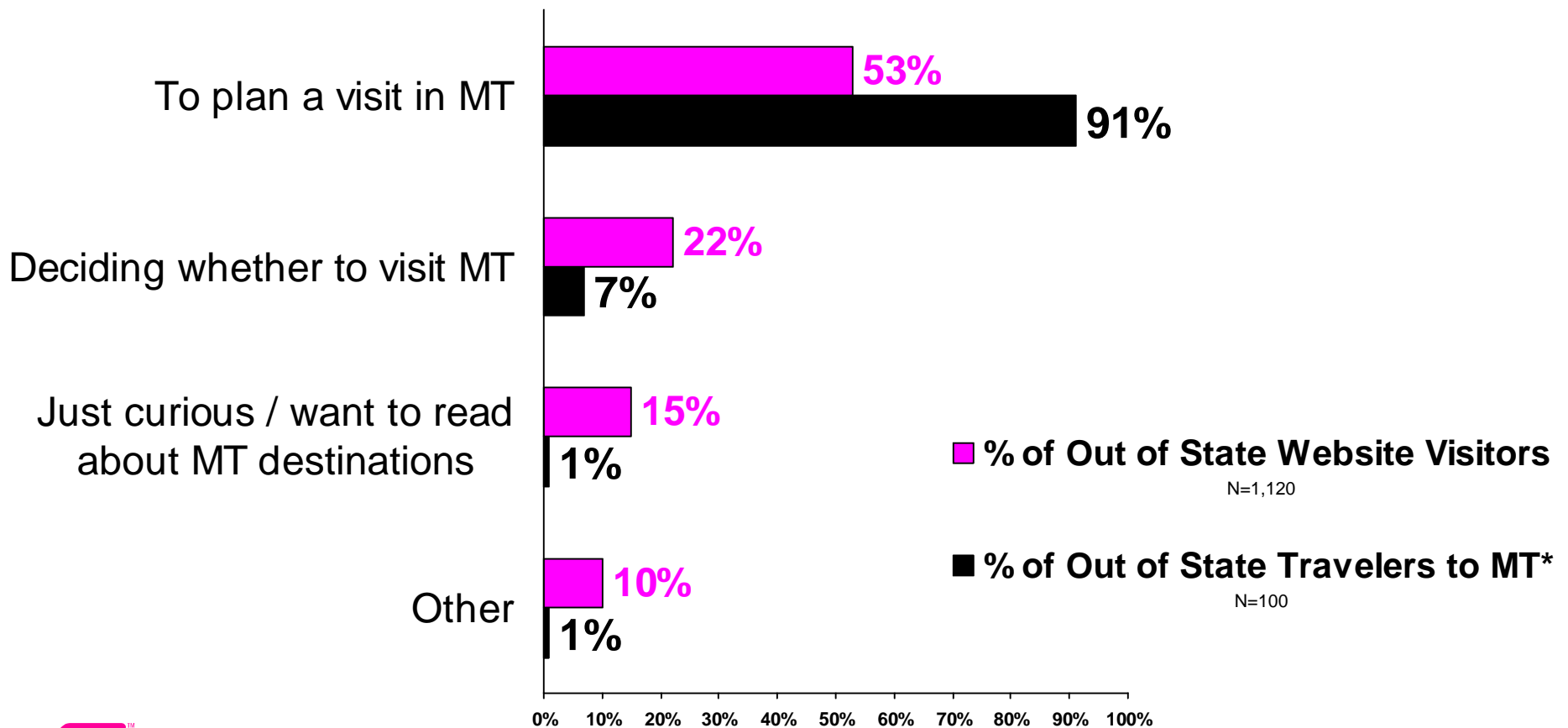


Q4: Is this your first visit to this website? (Select one) and Q5: How often have you visited this site? (Select one)

*Participated in follow-up conversion study.

Vast majority of Travelers to MT were planning a visit when intercepted with the first survey

Why Do They Visit the Website?



Q7: Which of the following statements best describes your visit to this website today? (Select one)

*Participated in follow-up conversion study.

Website Effectiveness...

Measuring Effectiveness using the Test/Control Method

- One group has experienced the site and the other group only entered the site
- Compare the two groups to **isolate the effects of the website**.
- For example, if “likelihood of visiting Montana” differs significantly between a test and control group, then the website is effective in influencing likelihood of visiting Montana.

TEST GROUP

(Experienced the Website)



Invited to take survey
either after or before
experiencing the site

CONTROL GROUP

(Only Entered the Website)



2 samples are collected &
later compared

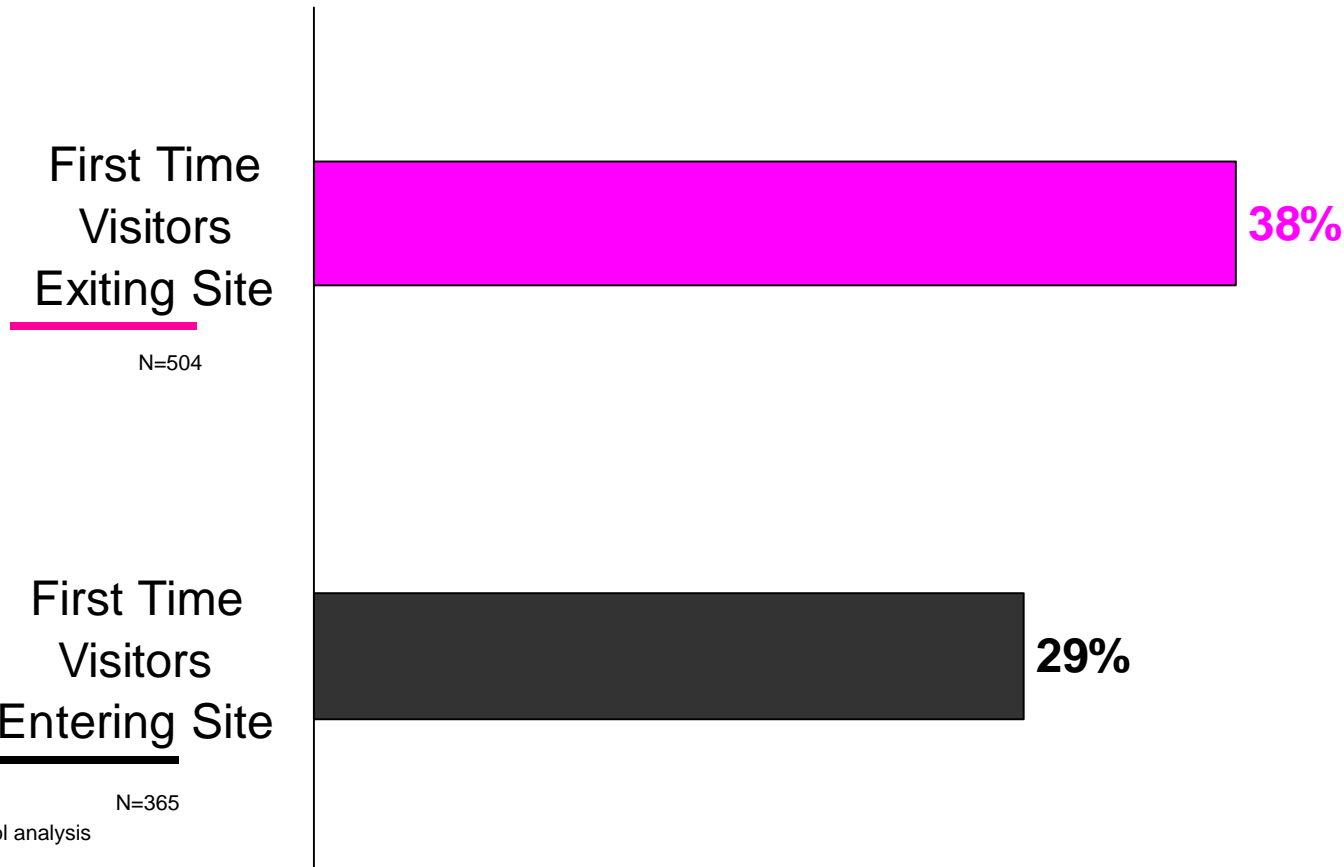


Website impacts likelihood to visit Montana

Significant difference exists in “Extremely Likely” to Visit the State

Does the Website Build Interest in Visiting Montana?

% Extremely Likely to Visit MT (Out of State website visitors)



Website does not impact image statements among 1st time visitors

However, more repeat visitors think MT is a good value & offers easy travel within the state, than 1st time visitors

Perceptions of Montana

% who think Montana fits the statement from among Out of State website visitors who are Somewhat likely, Very likely, or Extremely likely to visit the state

+ significant difference exists at 95% confidence	Total	Repeat Site Visitor	1 st Time Site Visit	1 st Time ENTER	1 st Time EXIT
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N=447

tns

Q20: We would like your general perceptions of the below destinations regarding vacations and leisure trips. It does not matter whether you have ever visited or not, we would like your impressions. Please select the vacation destination, if any, that you think <statement>. (Select all)

Website impacts interest in various activities

Though the website does not change what people would consider their primary activities, the website influenced more people to generally consider participating in four activities.

Does the Website Change Activities of Interest among Website Visitors?

% that would participate in this activity (but it would not be their primary activity in MT)

Significant difference exists at 95% confidence

	1 st Time ENTER	1 st Time EXIT
Visiting State Parks	79 %	86 %
Historic sites / Museums / Ghost Towns	76	82
Dinosaurs / Archaeology	52	60
Hot Springs / Water Parks	57	66

N=288

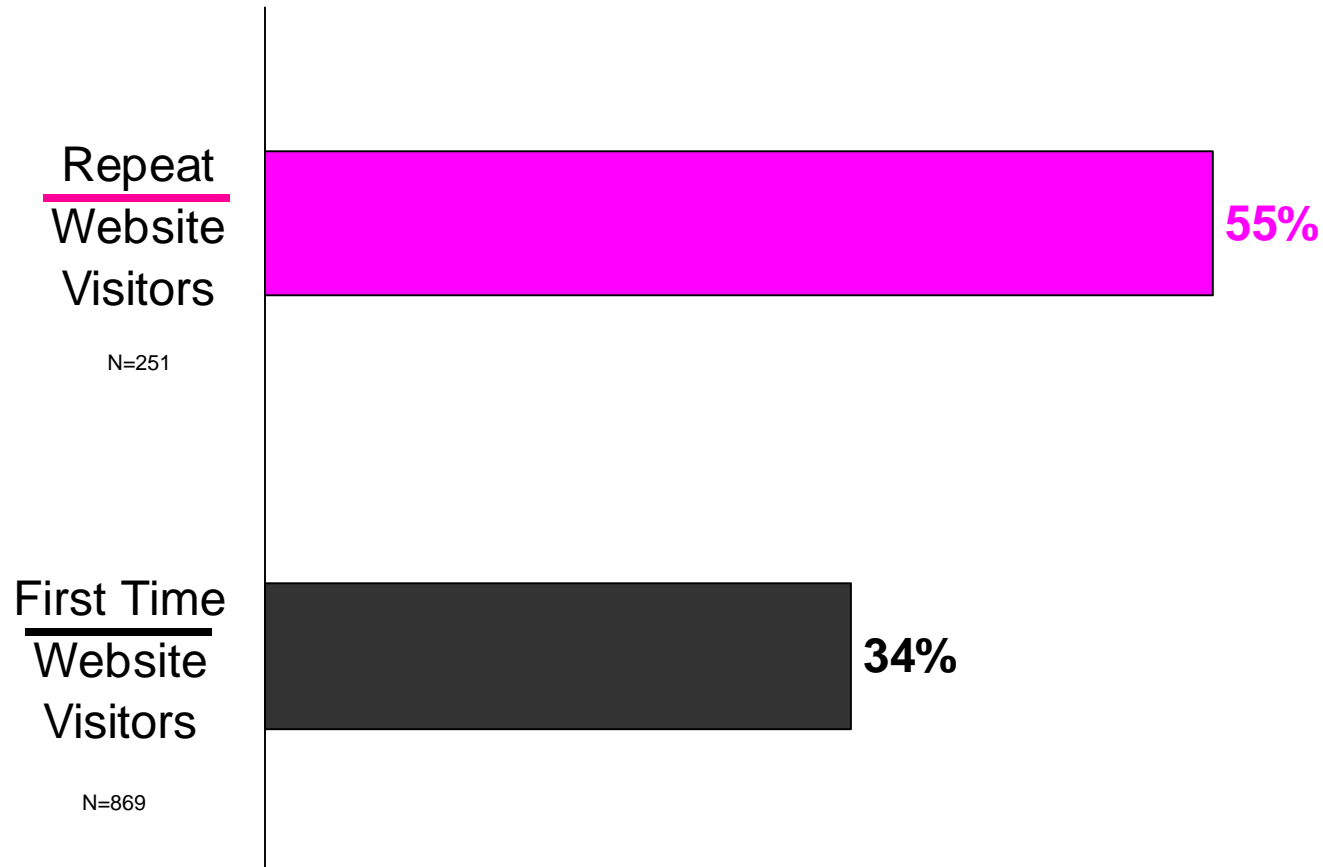
N=447

Repeat website visitors are more likely to visit MT

Significant difference in “Extremely Likely” to Visit the State

Does the Website Facilitate Interest in Visiting Montana?

% Extremely Likely to Visit MT (Out of State website visitors)

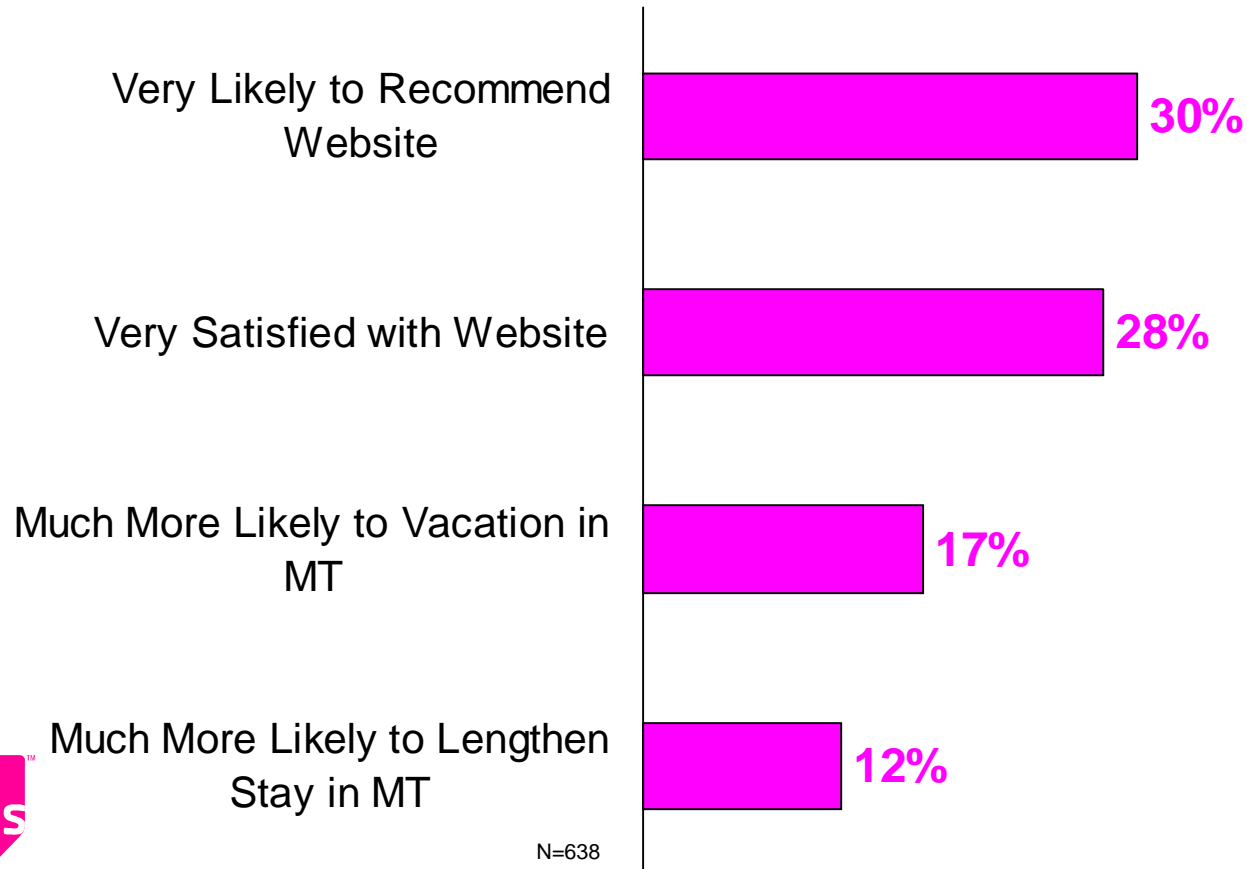


Website is impacting a sizeable number to travel to MT

Only 2% were 'not at all satisfied' with the website

How Effective is the Website?
Rated Website "10" on a 10 point scale

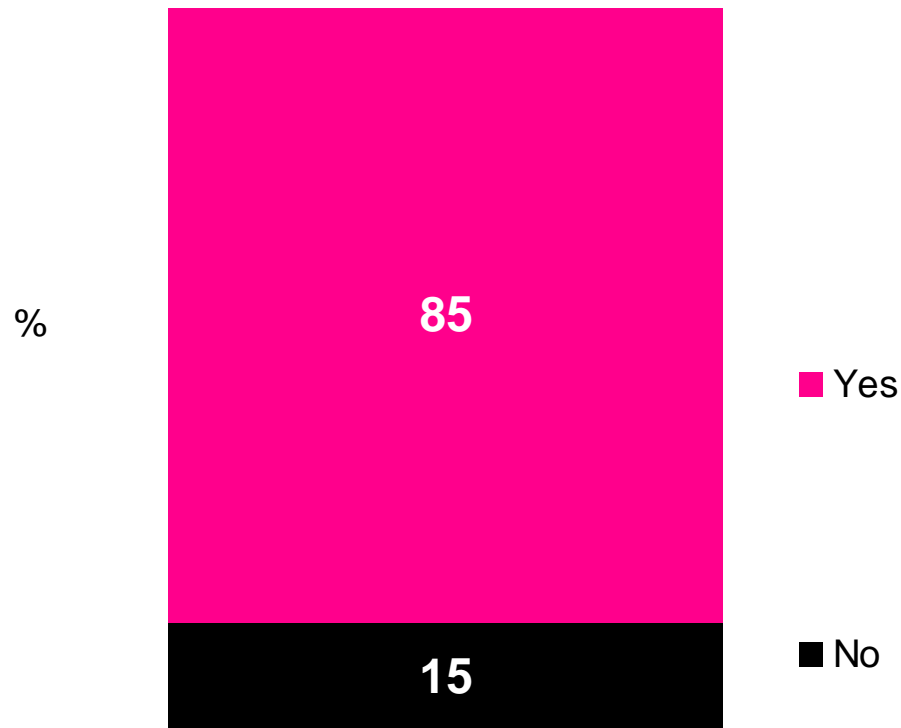
% of Out of State website visitors



Vast majority learned something new about MT

Because of your visit to this website, did you learn new things about Montana?

% of Out of State Website Visitors



N=638

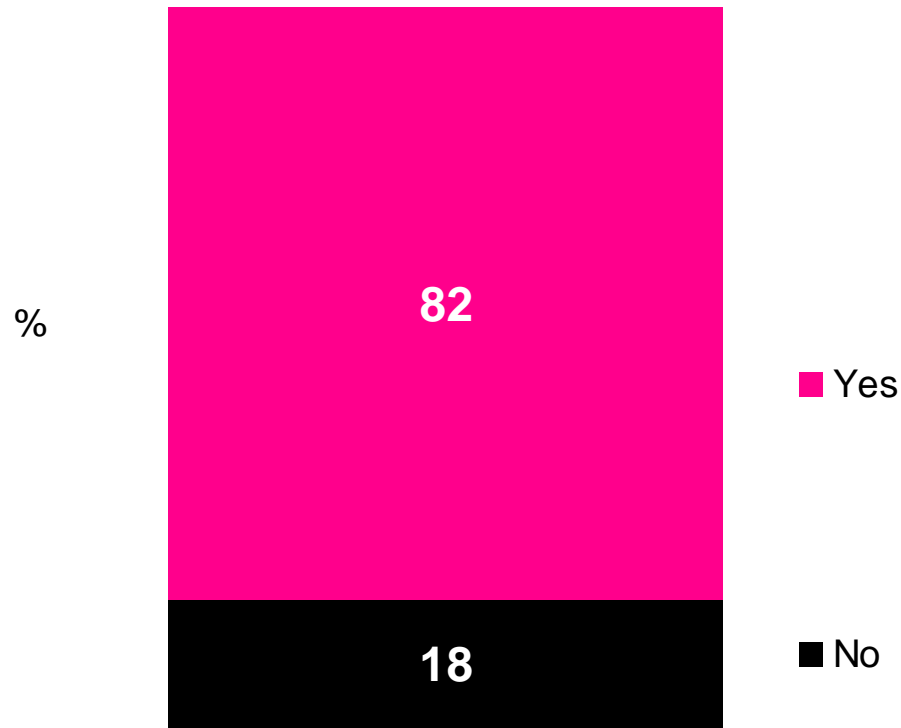


Q28: Because of your visit to this website, did you learn new things about Montana? (Select one)

Vast majority found everything they were looking for

Did you find everything on this website that you were looking for today?

% of Out of State Website Visitors



N=638



Q29: Did you find everything on this website that you were looking for today? (Select one)

Listening to Website Visitors...

Website visitors' suggestions...

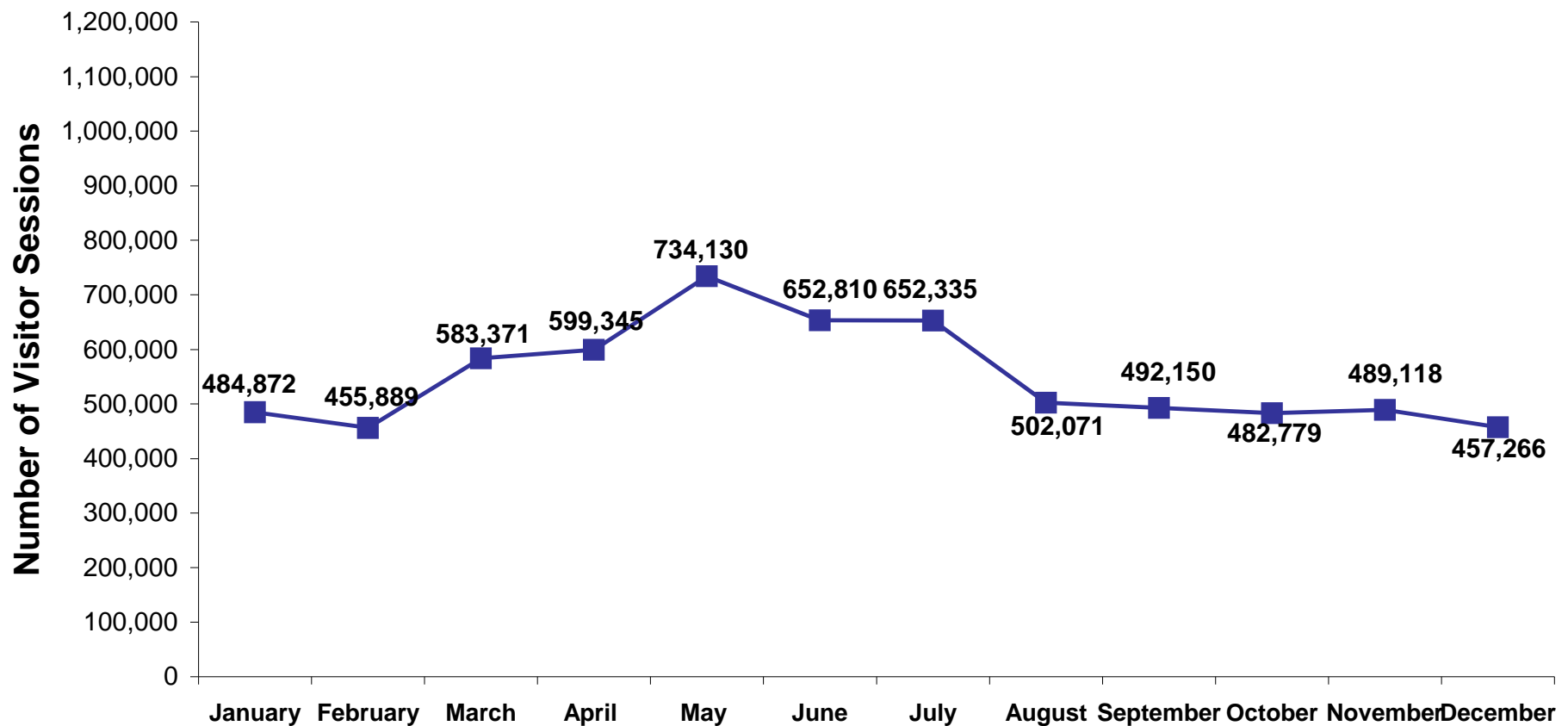
- More information on specific activities, including town specific activities.
- More information on lodging and prices.
- More powerful maps.
 - Maps to help with directions, but also help consolidate activity and lodging planning.
- More pictures

Website Traffic Analysis...

2006 website visitor traffic was heaviest from May—July

Traffic increased in March and peaked in May

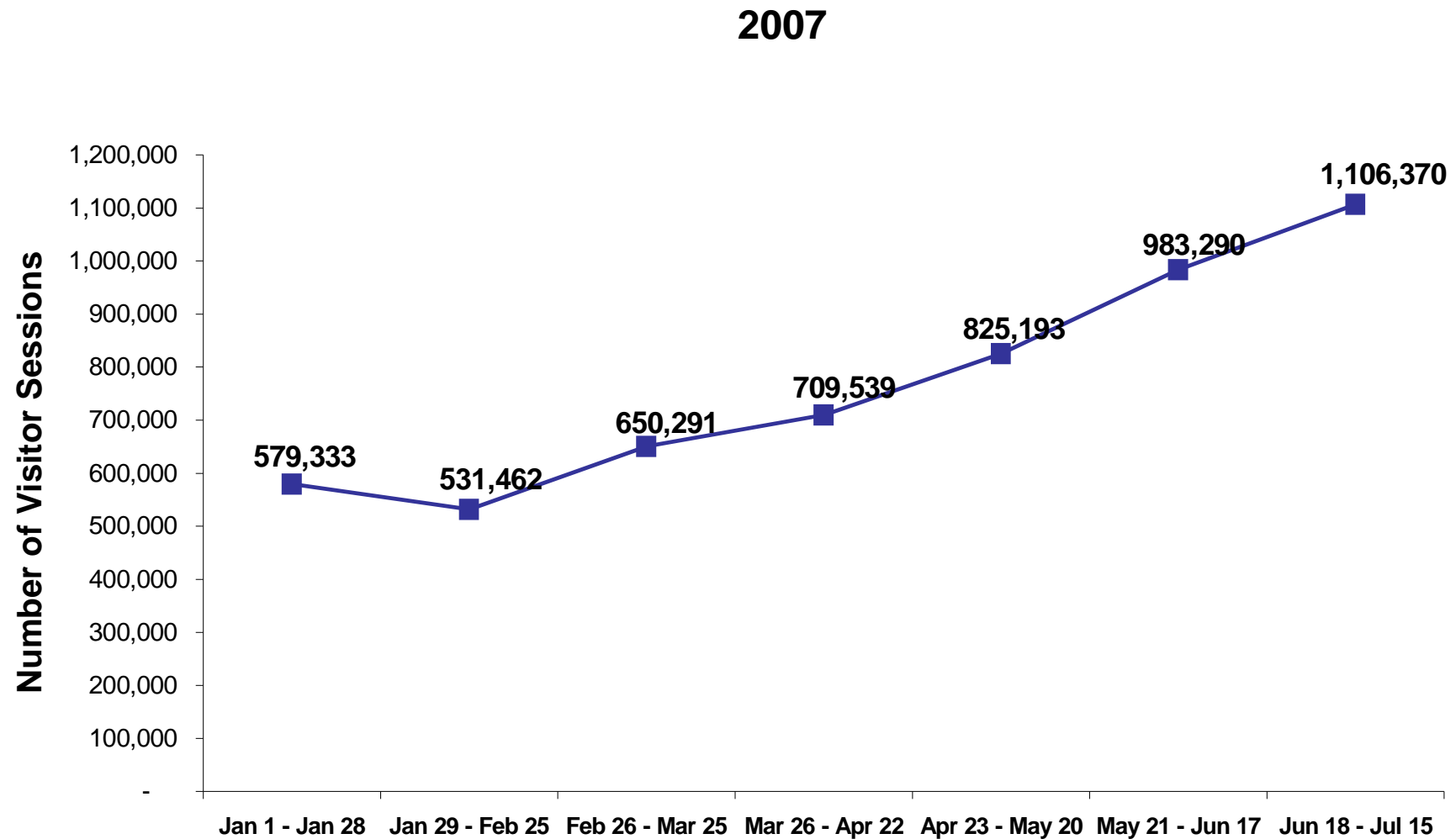
2006



Source: Webtrends

2007 traffic is much higher than 2006

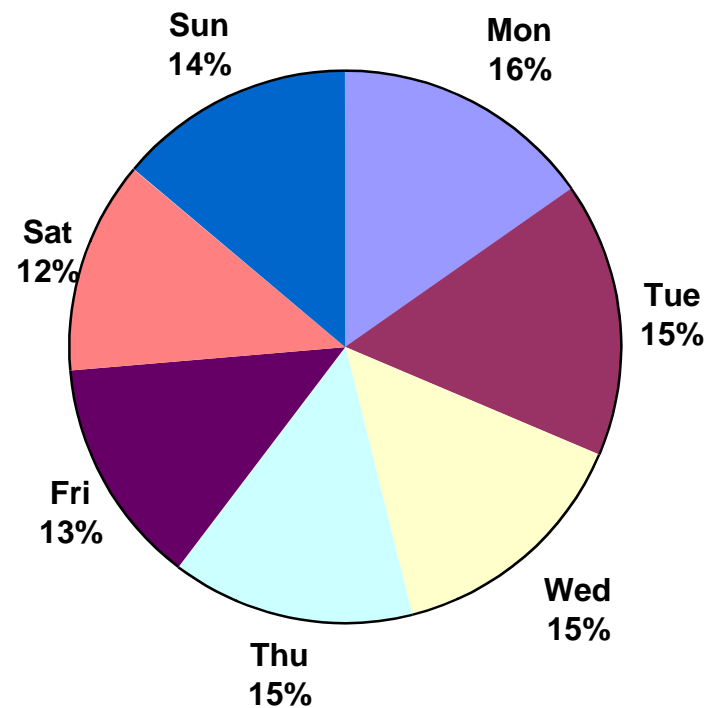
Unlike 2006, traffic does not peak in May



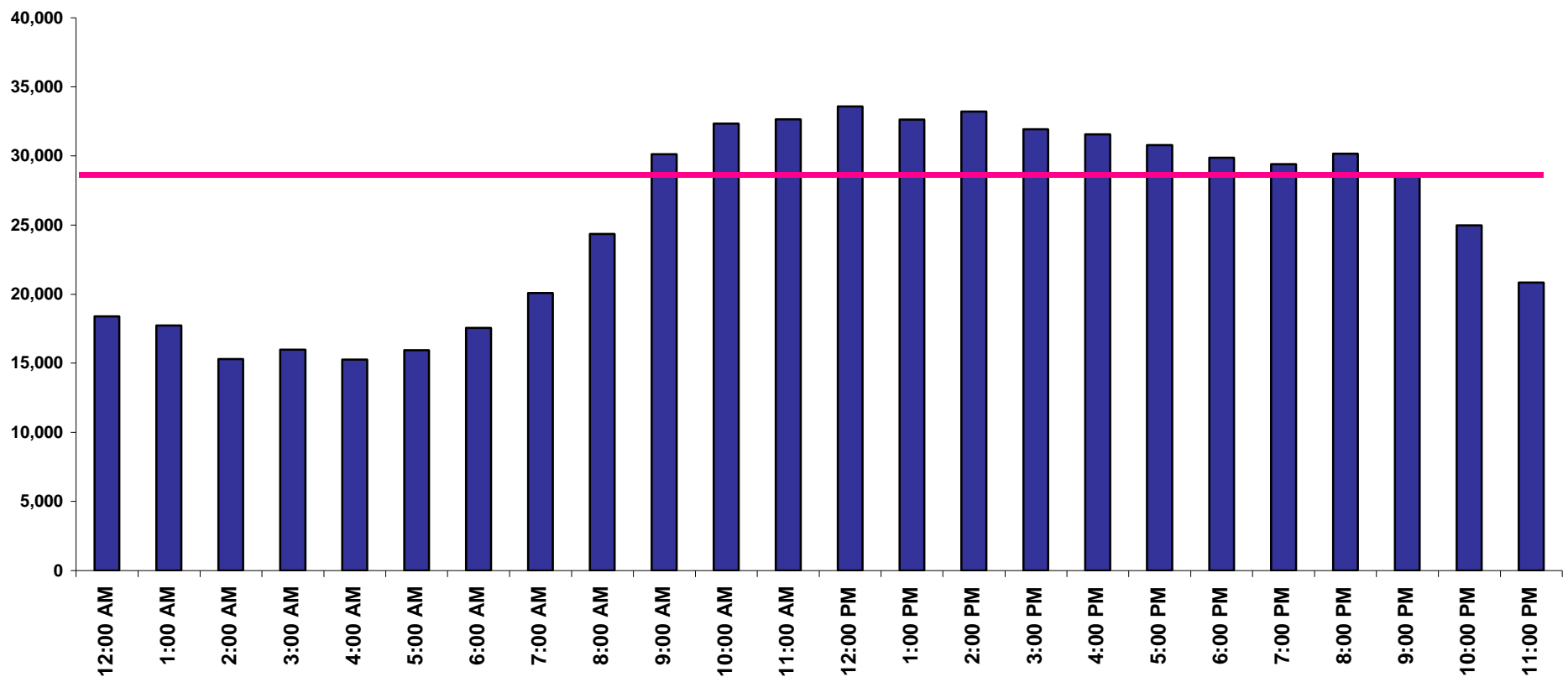
Source: Webtrends

Slight variation in daily traffic pattern

Highest traffic is early in the week



Highest traffic is from 9:00AM—9:00PM



Source: Webtrends

Survey data confirms that approximately $\frac{3}{4}$ of website visitors are first time visitors (78% of survey data)

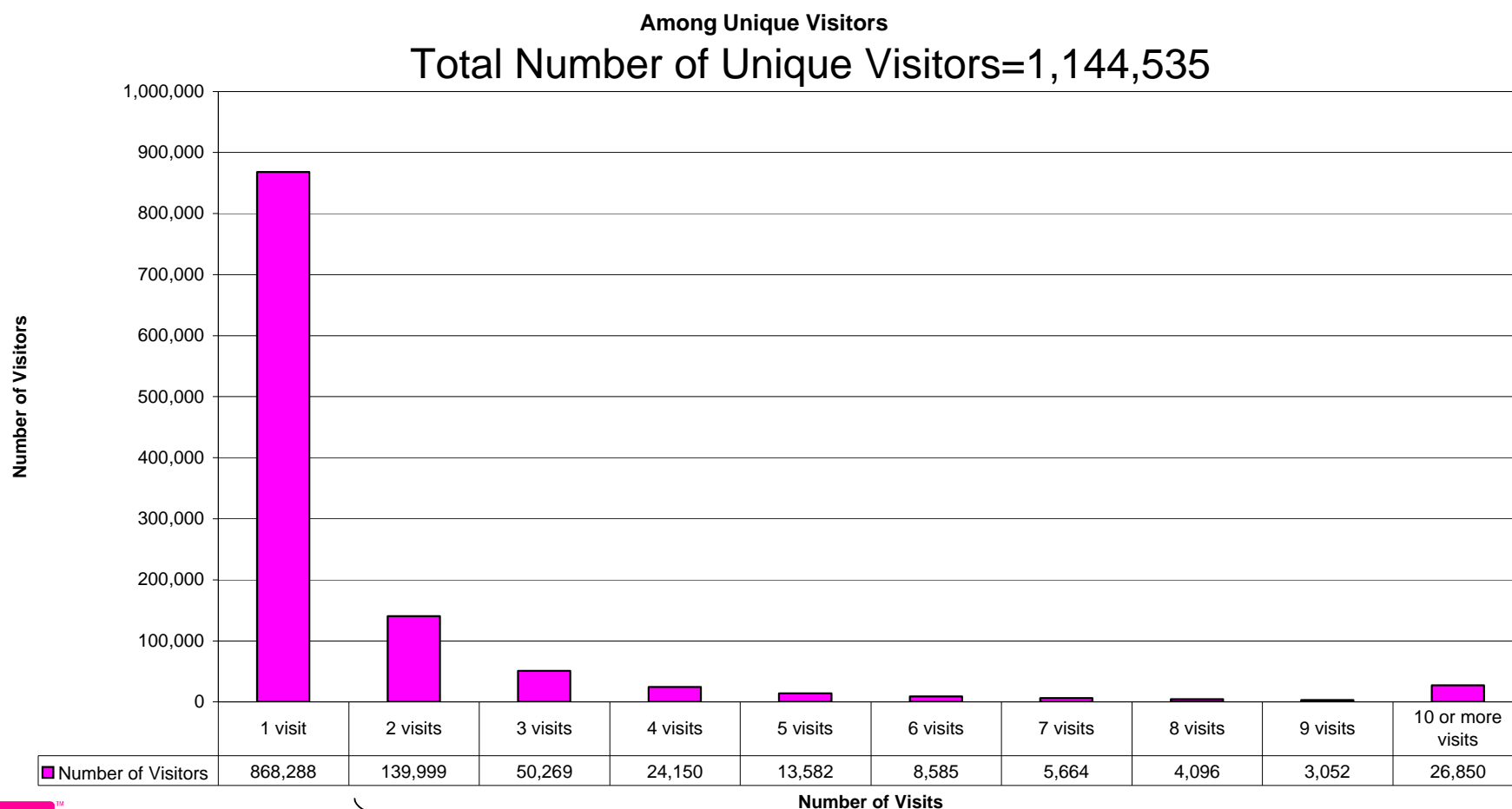
YTD Summary Statistics (January 1 -- August 13, 2007)

	Count	%
Visits (excluding spiders)	3,504,669	100%
Visits Referred by Search Engines	945,827	27%
Average Visits Per Day (excluding spiders)	15,576	
Median Average Visit Length	2:23	
Mean Average Visit Length	5:56	
Unique Visitors	1,144,535	100%
Visitors Who Visited Once	868,288	76%
Visitors Who Visited More Than Once	276,247	24%
Page Views	20,579,206	100%
Average Per Day	91,463	
Average Per Unique Visitor	17	



Source: Webtrends

- Survey data confirms that first time visitors comprise approximately 78% of the website's traffic.
- According to survey data, 34% of first time visitors and 55% of repeat visitors are 'extremely likely' to visit Montana (highly qualified website visitors).
- Based on the number of first time visitors vs. repeat visitors, 2/3rds of highly qualified website visitors will only visit the website once.
- **The website's design should assume visitors' must easily accomplish their goals in only one visit.**



Total Number of **1st Time Visitors**=868,288
X 34% = **295,218 highly qualified website visitors**

Total Number of **Repeat Visitors**=276,247
X 55% = **151,935 highly qualified website visitors**

Source: Webtrends
Note: survey calculations are based on Out of State visitors who comprise 93% of visitors

Majority of visits last under one minute.

Recommend advertising testing techniques to ensure home page engages the maximum number of visitors

YTD Time Statistics (January 1 -- August 13, 2007)

	Count	%
Visits (excluding spiders)	3,504,669	100%
Length of Visits in Minutes		
0-1 (excluding spider visits)	2,597,959	74.1%
1-2	167,960	4.8%
2-3	121,716	3.5%
3-4	94,733	2.7%
4-5	75,815	2.2%
5-6	64,783	1.8%
6-7	56,757	1.6%
7-8	50,604	1.4%
8-9	46,558	1.3%
9-10	42,902	1.2%
10-11	22,503	0.6%
11-12	18,663	0.5%
12-13	15,682	0.4%
13-14	13,599	0.4%
14-15	12,036	0.3%
15-16	10,437	0.3%
16-17	8,977	0.3%
17-18	7,974	0.2%
18-19	6,959	0.2%
>19	67,971	1.9%



Source: Webtrends

- Paid keyword buys of top organic search words and phrases could increase qualified traffic.
- MSN search is not showing up as significant source of traffic, consider recalibrating SEO procedures with MSN.

YTD Search Related Statistics (January 1 -- August 13, 2007)		
	Count	%
Top Search Engines		
Google	807,601	85.0%
Yahoo	119,542	13.0%
AOL NetFind	20,789	2.0%
AltaVista	1,185	0.0%
MSN	84	0.0%
Top Search Phrases		
Montana	98,284	10%
Montana fires	23,588	2%
Montana tourism	18,392	2%
Map of montana	11,024	1%
Montana wildfires	8,895	1%
Montana cities	7,866	1%
Montana vacations	7,071	1%
Montana travel	5,931	1%
Montana vacation	5,478	1%
visit Montana	5,306	1%



Source: Webtrends

Most visits are not referred by another site or “Visitmt” is typed directly into the URL.

Google is the primary referring site

YTD Top Referring Sites (January 1 -- August 13, 2007)	
Top Referring Sites	
No Referrer	2,951,130
http://www.google.com	493,800
http://visitmt.com	477,678
http://www.visitmt.com	202,281
http://travel.state.mt.us	197,366
http://search.yahoo.com	80,894
http://mt.gov	79,155
http://sweepstakes.visitmt.com	45,933
http://www.surf4all.net	38,427
http://images.google.com	29,648



The # of home page exits is nearly half of the # of home page enters, indicating many explore past the home page before exiting the site. Guestbook orders and RegionMap are high Exit pages.

YTD Top Entry and Exit Pages (January 1 -- August 13, 2007)

	Count	%	
Top Entry Pages			
http://visitmt.com/	217,935	4.9%	384,505
http://www.visitmt.com/	166,570	3.7%	
http://travel.state.mt.us/	76,466	1.7%	200,150
http://visitmt.com/guestbook/guestbook_order.asp	59,225	1.3%	
http://visitmt.com/robots.txt	47,296	1.0%	
http://www.visitmt.com/ad_tracker/kanoodle06.html	45,630	1.0%	
Top Exit Pages			
No URL	272,550	5.8%	200,150
http://visitmt.com/	117,873	2.5%	
http://www.visitmt.com/	82,277	1.7%	200,150
http://visitmt.com/guestbook/guestbook_order.asp	73,902	1.6%	
http://visitmt.com/include/RegionMap.swf	47,230	1.0%	
http://www.visitmt.com/ad_tracker/kanoodle06.html	42,427	0.9%	
http://visitmt.com/fire/conditions.htm	42,248	0.9%	



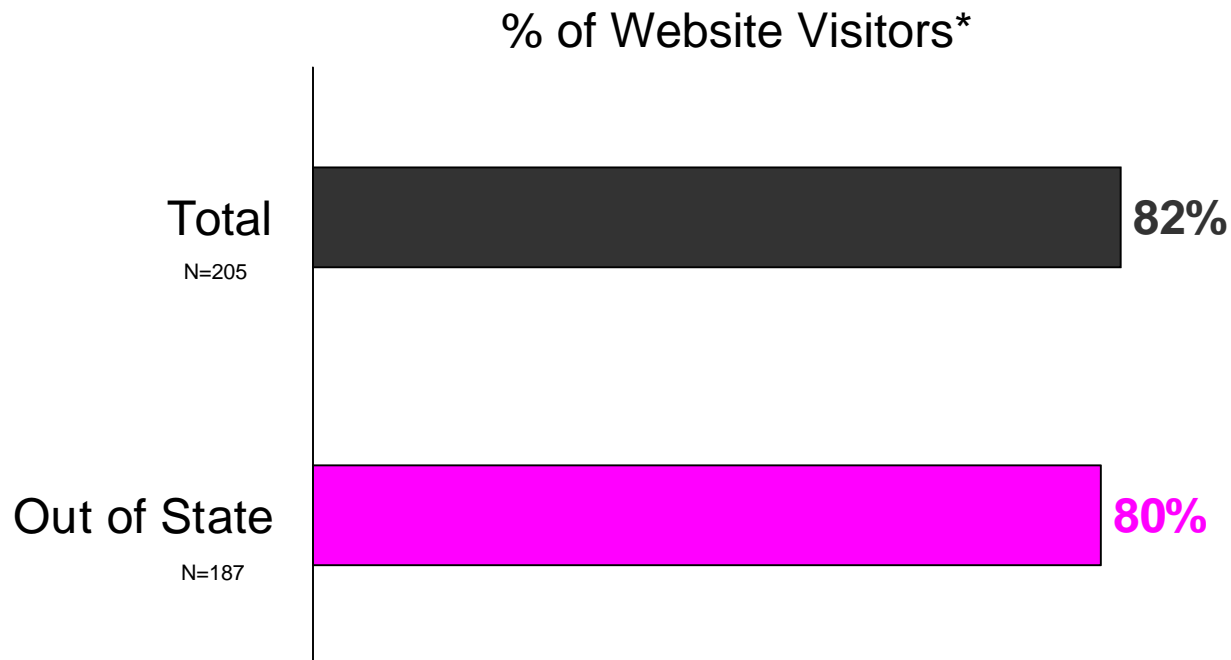
Converting Website Visitors... to Montana Travelers



Large majority of website visitors took summer trips

In the initial intercept survey,** 83% of website visitors took an out of state trip of 200 miles or more in the past 12 months—current behavior is consistent.

Did you take **any** leisure trips or vacations this summer season?
(Beginning of May–end of September 2007)

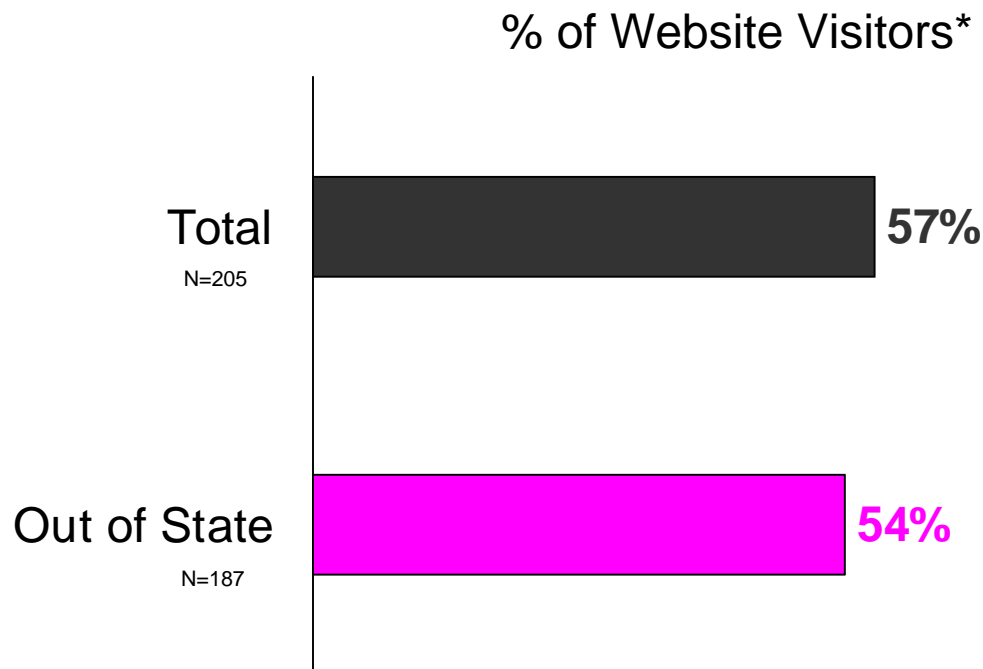


*Participated in follow-up survey. Nine percent of Total Respondents are MT residents (N=18, too small to display). Seven percent of the initial intercept survey's participants are MT residents.

**Based on 1,208 Total Respondents from the initial intercept survey who were asked "During the past 12 months, did you take any trips of 200 miles or more that took you outside of your home state or province?"

57% of website visitors converted into vacation or leisure trip travelers in MT—"Conversion Rate"

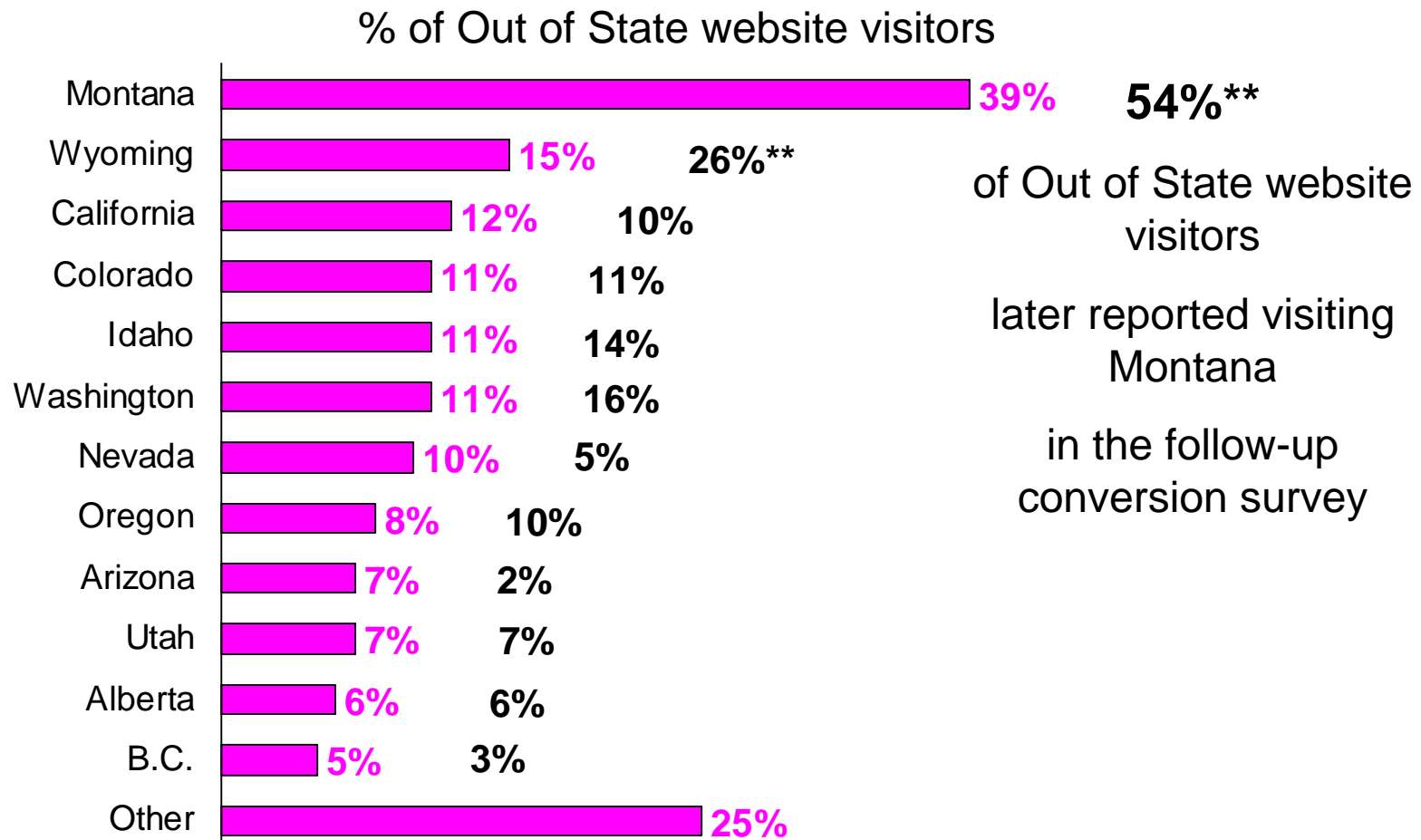
Did you take any leisure trips or vacations in Montana this summer?
(beginning of May–end of September 2007)



*participated in follow-up survey

In the initial intercept survey, over twice as many website visitors were interested in visiting MT than other nearby states
 Over twice as many actually visited MT than other nearby states

How Many Said They Are “Extremely Likely” to Visit a State?*



*N=1,120; Initial intercept survey, Q16: How likely are you to take a vacation or leisure trip in the following states or provinces in the next 12 months? (Select one each)

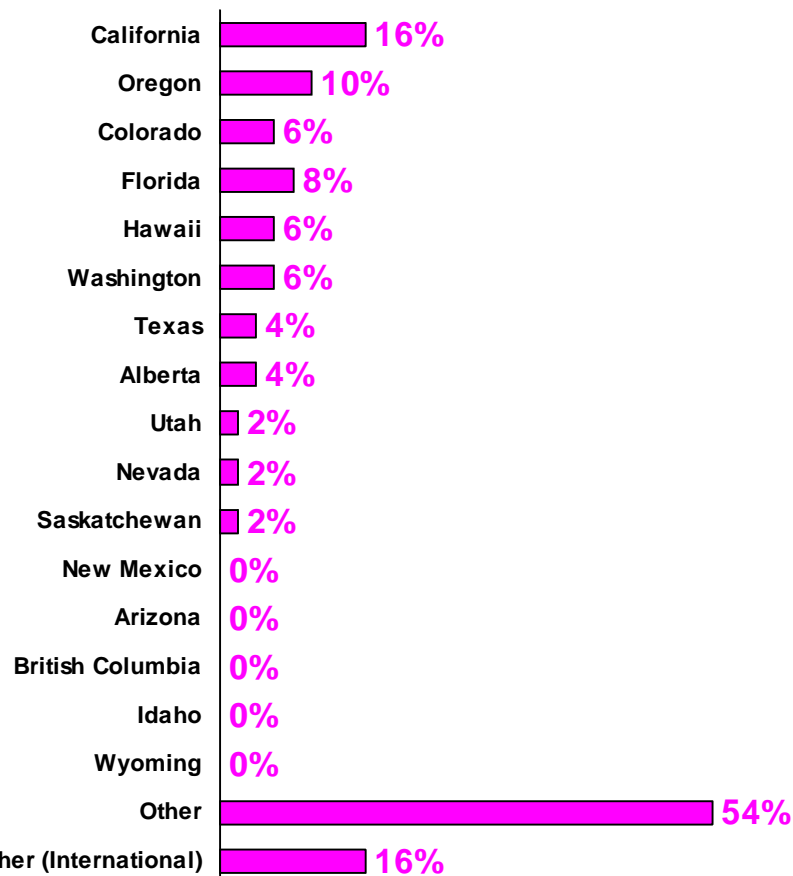
**N=187; Recontact survey Q3: Did you take any leisure trips or vacations in Montana this summer (May-September 2007). **Q5 Recontact: Where did you take a leisure trip or vacation this summer?

Those who did not visit MT, also did not visit WY

This suggests MT and WY are not mutually exclusive destination choices

Where did you take a leisure trip or vacation this summer?
(Beginning of May–end of September 2007)

% of Out of State Website Visitors* that Traveled, but not to MT



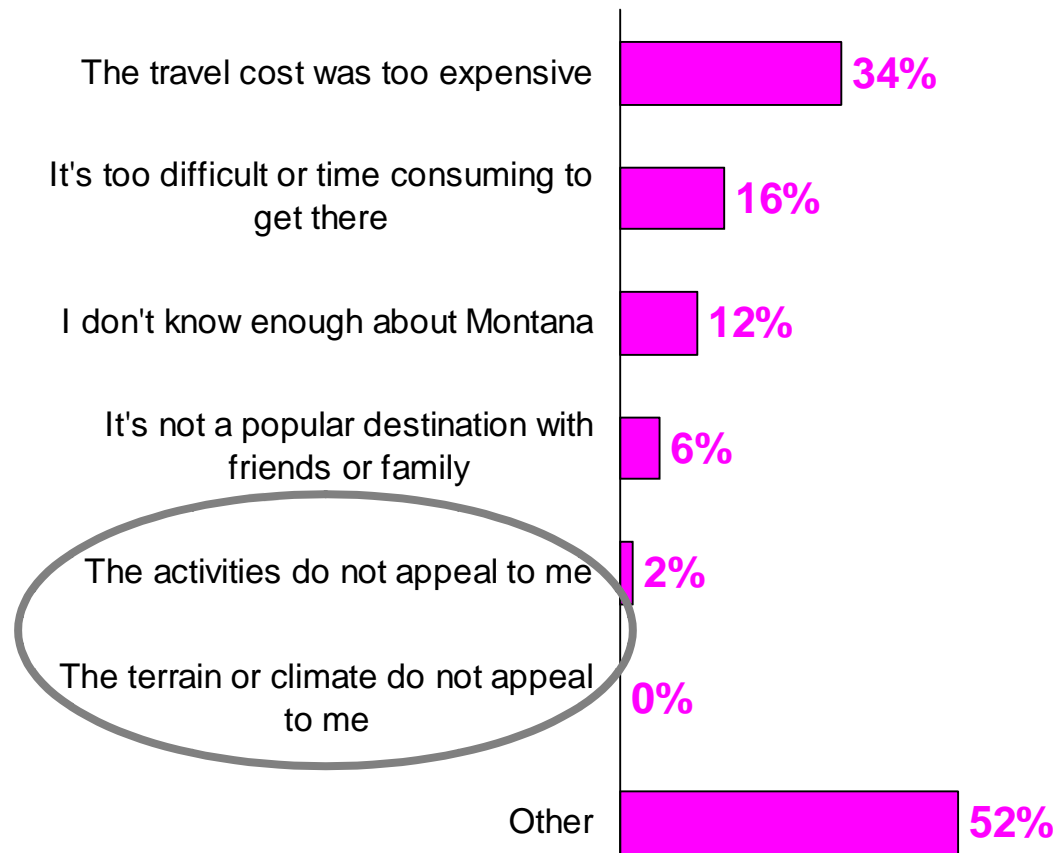
*participated in follow-up survey (Q5)

N=50; Small base

Nearly no one said MT's activities/environment are not appealing

Why did you not take a leisure trip or vacation in Montana this summer?
(Beginning of May–end of September 2007)

% of Out of State Website Visitors* that Traveled, but not to MT



*participated in follow-up survey (Q4)

N=50; Small base

Out of State travelers spent about a week in MT during the summer

How many **days in total** did you spend in Montana this summer during your leisure trips or vacations? (beginning of May–end of September 2007)

of days in total in MT among Website Visitors* who took trips in MT

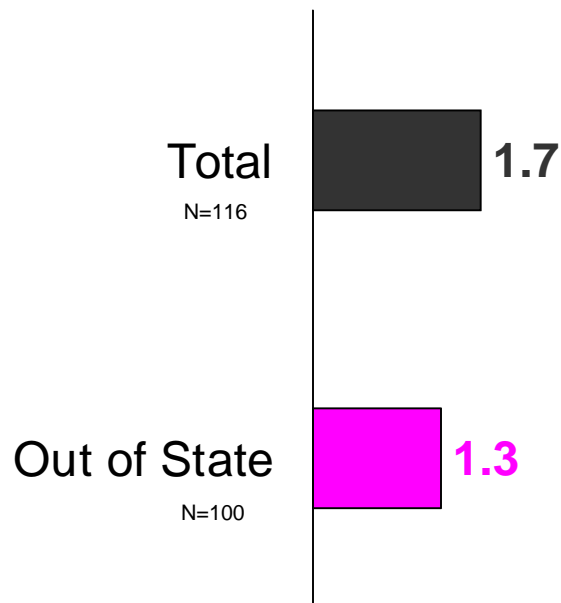


*participated in follow-up survey (Q7)

Out of State travelers took approximately one trip to MT

How many leisure **trips or vacations** did you take within Montana this summer?
(beginning of May–end of September 2007)

of MT trips among Website Visitors* who took a trip in MT

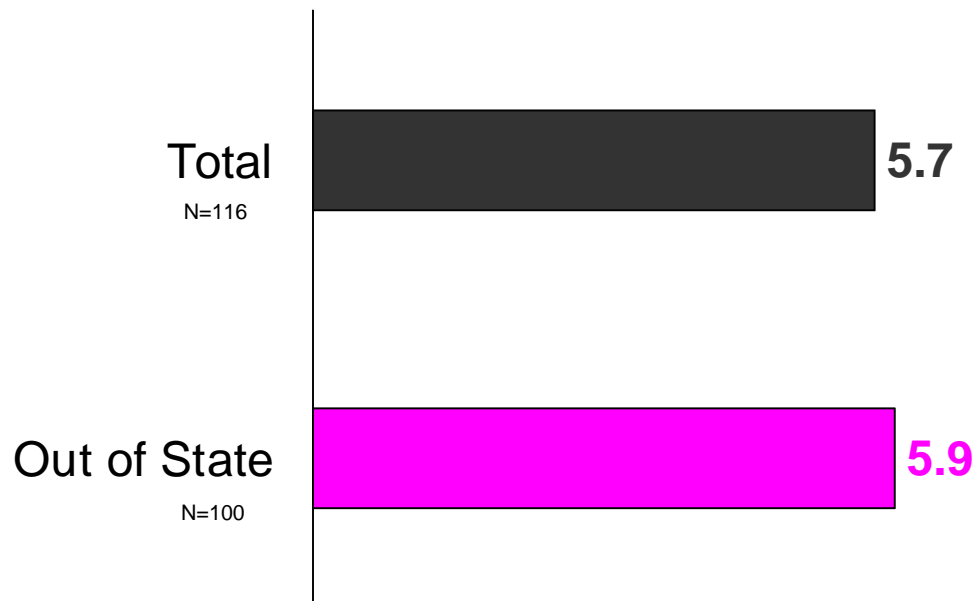


*participated in follow-up survey (Q6)

Out of State travelers' average trip lasted nearly a week

How many days in total / How many trips
(beginning of May–end of September 2007)

Average # of days per trip among Website Visitors* who took a trip in MT

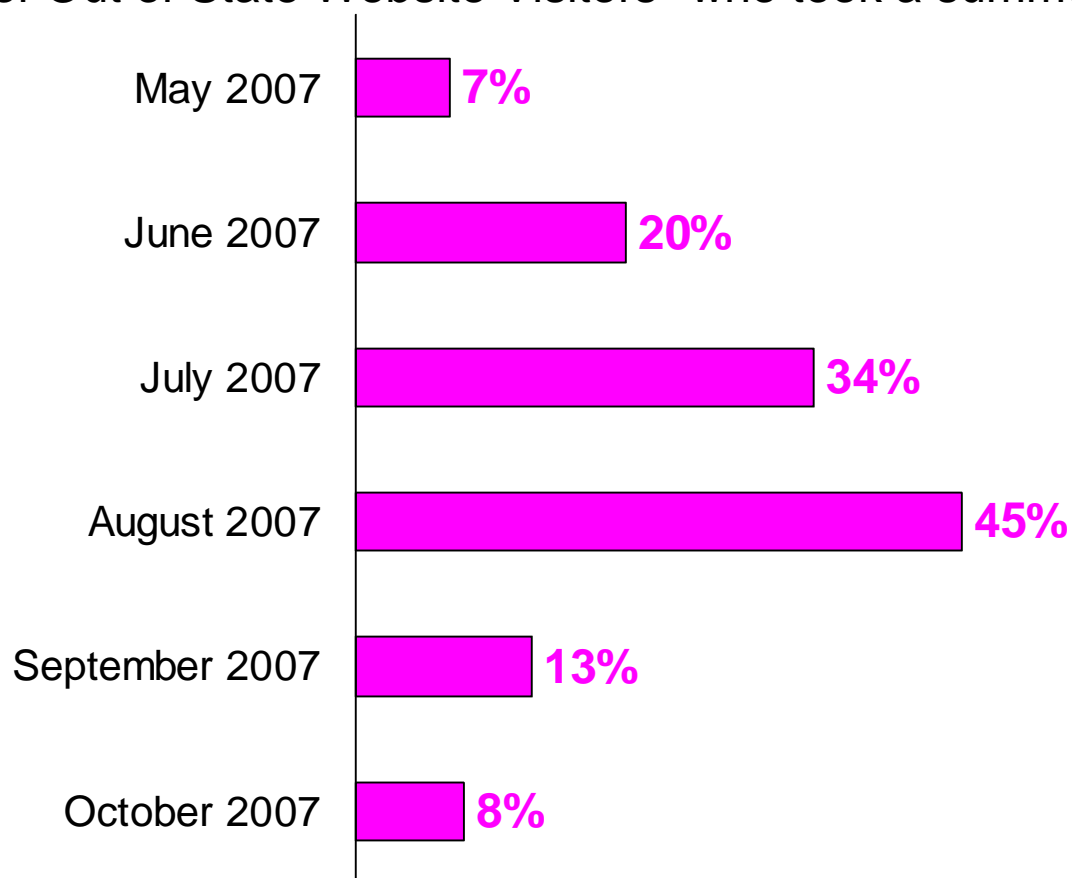


*participated in follow-up survey. Average # of days per trip is calculated using mean averages with one decimal; this explains why dividing by the whole numbers in this report do not exactly match the above numbers.

July—August are peak travel months

In which months did you travel in Montana for leisure trips or vacations?
(beginning of May—end of September 2007)

% of Out of State Website Visitors* who took a summer trip to MT



N=100

*participated in follow-up survey (Q8)

Wildlife watching & shopping was more popular than anticipated

Nearly a third visited family or friends

What activities did you include in your vacations or leisure trips in Montana this summer?

% of Out of State Website Visitors* who took a summer trip in MT

	Actual Activities*	Travelers' Intended Primary Activities**	Website Visitors' Intended Primary Activities***
Scenic sight seeing on my own, without a tour group or guide	76%	67%	67%
Visiting National Parks	71%	75%	71%
Wildlife watching	66%	49%	48%
Natural landmarks like Caverns, Geysers, and Glaciers	55%	62%	63%
Historic sites/ Museums/ Ghost Towns	48%	38%	47%
Shopping	48%	14%	22%
Day hiking	47%	40%	36%
Visiting State Parks	44%	49%	55%
Visiting family or friends	30%	34%	21%
Fine or Unique Dining	25%	16%	18%
RV/ Camping	22%	25%	23%
Fishing	15%	20%	21%
Scenic sight seeing with a tour group or guide	13%	6%	19%
Breweries/ Wineries	13%	13%	17%
Native American culture/ PowWows /Indian Nations/ Native Art	12%	20%	27%
Hot springs/ Water parks	12%	17%	26%
Dinosaurs/ Archaeology	11%	17%	20%
Other	11%	10%	13%



*Participated in follow-up survey (Q9b). **MT Travelers who participated in initial intercept survey (Q19a). ***All Out-of-State website visitors who were at least somewhat likely to visit MT in the initial intercept survey (Q19a)

N=100

N=98

N=956

Cowboy culture & canoeing had lower than anticipated participation

What activities did you include in your vacations or leisure trips in Montana this summer?

% of Out of State Website Visitors* who took a summer trip in MT

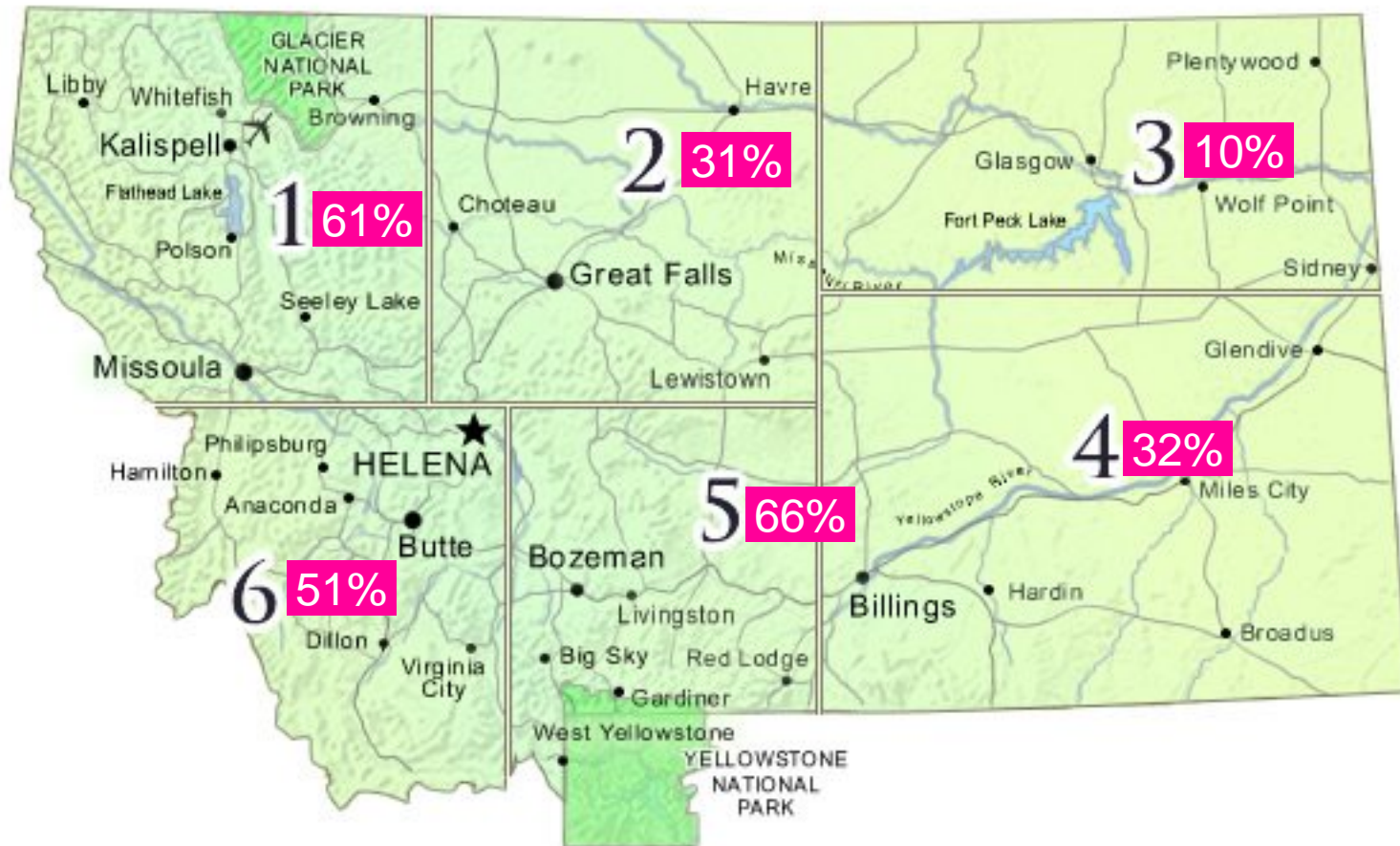
	Actual Activities*	Travelers' Intended Primary Activities**	Website Visitors' Intended Primary Activities***
Art galleries	11%	9%	10%
Casinos	11%	6%	9%
Horseback riding	10%	17%	19%
Antiques	10%	11%	12%
Nightlife	10%	6%	8%
Off-highway vehicle use	7%	8%	7%
Cowboy culture/Ranches/Cattle drives/Rodeos	6%	17%	22%
Whitewater rafting/Kayaking	6%	14%	18%
Golf	6%	4%	5%
Theater/Musical events/Festivals	5%	7%	12%
Overnight backpacking/Rock climbing/Mountaineering	5%	11%	10%
Mountain Biking/Road Cycling	5%	7%	8%
Agricultural or Farming events/Fairs	4%	9%	12%
Spa/Health/Luxury resort	3%	5%	8%
Recreational motor boating	3%	5%	6%
Weddings	3%	2%	2%
Canoeing	1%	13%	13%
Hand gliding/Sky diving/ Scuba diving/ Snorkeling	0%	3%	5%
Average Number of Activities	7	7	8

*Participated in follow-up survey (Q9b). **MT Travelers who participated in initial intercept survey (Q19a). ***All Out-of-State website visitors who were at least somewhat likely to visit MT in the initial intercept survey (Q19a)

The majority visited 3 regions

Which regions of MT did you visit during your vacation or leisure trips in MT this summer?

% of Out of State Website Visitors* who took a summer trip in MT



*participated in follow-up survey.

N=100

Q9A: Above is a map of Montana that is divided into six regions. Which regions of Montana did you visit during your vacations or leisure trips in Montana this summer?

The 3 most popular regions are differentiated from the other regions by the most popular activities

For each activity, in which regions did you participate in that activity?

Total Out of State
Travelers*



	100%	61%	31%	10%	32%	66%	51%
Scenic sight seeing on my own, without a tour or guide	76%	45%	17%	6%	16%	43%	36%
Visiting National Parks	71%	40%	3%	0%	6%	46%	4%
Wildlife watching	66%	39%	8%	2%	7%	47%	28%
Natural landmarks like Caverns, Geysers, Glaciers, etc.	55%	27%	7%	2%	7%	33%	11%
Historic sites/Museums/Ghost Towns	48%	17%	8%	2%	9%	25%	21%
Shopping	48%	31%	10%	1%	8%	26%	22%
Day hiking	47%	28%	4%	1%	5%	22%	15%
Visiting State Parks	44%	19%	8%	1%	4%	17%	22%
Visiting family or friends	30%	13%	1%	1%	1%	8%	11%
Fine or Unique Dining	25%	16%	3%	0%	4%	14%	9%
RV/Camping	22%	15%	5%	2%	3%	9%	8%
Fishing	15%	7%	3%	1%	0%	7%	5%
Scenic sight seeing with a tour group or guide	13%	6%	2%	0%	1%	5%	5%
Breweries/Wineries	13%	7%	2%	0%	1%	4%	2%
Native American culture/PowWows/Indian Nations/Native Art	12%	6%	3%	0%	1%	3%	0%
Hot springs/Water parks	12%	0%	0%	0%	1%	9%	2%
Dinosaurs/Archaeology	11%	0%	2%	0%	2%	7%	2%
Other	11%	3%	1%	0%	1%	3%	2%



*participated in follow-up survey.

Displayed values are absolute percentages among all Out of State visitors to MT, N=100. In other words, 5% of all 100 MT visitors participated in RV/Camping in Region 2.

An activity is highlighted in yellow if the region has the relatively highest share of the activity's participants, relative to the region's share of visitors.

The 3 most popular regions are differentiated from the other regions by the most popular activities

For each activity, in which regions did you participate in that activity?

Total Out of State Travelers*



	100%	61%	31%	10%	32%	66%	51%
Art galleries	11%	7%	1%	0%	1%	3%	3%
Casinos	11%	5%	4%	2%	2%	0%	1%
Horseback riding	10%	4%	0%	0%	0%	6%	1%
Antiques	10%	5%	1%	0%	2%	6%	6%
Nightlife	10%	2%	1%	1%	1%	3%	2%
Off-highway vehicle use	7%	2%	0%	0%	0%	4%	2%
Cowboy culture/Ranches/Cattle drives/Rodeos	6%	1%	0%	0%	3%	3%	1%
Whitewater rafting/Kayaking	6%	4%	0%	0%	0%	2%	0%
Golf	6%	3%	0%	1%	1%	2%	2%
Theater/Musical events/Festivals	5%	3%	0%	0%	0%	0%	3%
Overnight backpacking/Rock climbing/Mountaineering	5%	1%	1%	1%	0%	3%	0%
Mountain Biking/Road Cycling	5%	4%	0%	0%	0%	1%	0%
Agricultural or Farming events/Fairs	4%	3%	1%	0%	0%	1%	2%
Spa/Health/Luxury resort	3%	1%	0%	0%	0%	2%	1%
Recreational motor boating	3%	3%	0%	0%	0%	0%	0%
Weddings	3%	1%	0%	0%	0%	0%	1%
Canoeing	1%	1%	0%	0%	0%	0%	0%
Hand gliding/Sky diving/Scuba diving/Snorkeling	0%	0%	0%	0%	0%	0%	0%



*participated in follow-up survey.

Displayed values are absolute percentages among all Out of State visitors to MT, N=100. In other words, 7% of all 100 MT visitors participated in Art galleries in Region 1.

An activity is highlighted in yellow if the region has the relatively highest share of the activity's participants, relative to the region's share of visitors.

Website visitors spent nearly \$2,500 over 6 days in MT

Website visitors spent more in MT than usual, they spend nearly \$1,600 on a typical trip*

How much money did you spend during your most recent summer leisure trip or vacation in Montana?

(May–September 2007)

\$	OUT OF STATE	TOTAL
Lodging	\$615	\$595
In-state transportation	363	351
Shopping/gifts	321	317
Food/beverage/dining	318	301
Summer Activities	315	302
Other	257	244
Other entertainment	159	160
Groceries	157	158
Parking/tolls	37	37
Total	\$2,542	\$2,465



Participated in follow-up survey

N=100

N=116

Website facilitated nearly \$785 million of MT tourism \$ from website visitors during the study period May–July 2007

Return on Website Investment Website Visitors from May–July 2007

Winter website visitors (# of unique visitors from Webtrends website traffic May–July 2007)	558,682
Website conversion rate (calculated from follow-up survey; N=205)	57%
# of website visitors that traveled to MT (Website visitors X Conversion rate)	318,448
\$ spent in MT per website visitor (Does not include transportation costs to MT; follow-up survey; N=100)	\$2,465
Projected \$ spent by all website visitors that traveled to MT	784,974,320
\$ cost for website	\$629,159
Travel spending per website \$	\$1,248

Website facilitated over \$1.1 billion of MT tourism \$

assuming May–Sept. website traffic behaved the same as May–July sample

Return on Website Investment Website Visitors from May–September 2007

Winter website visitors (# of unique visitors from Webtrends website traffic May–September 2007)	834,862
Website conversion rate (calculated from follow-up survey; N=205)	57%
# of website visitors that traveled to MT (Website visitors X Conversion rate)	475,871
\$ spent in MT per website visitor (Does not include transportation costs to MT; follow-up survey; N=100)	\$2,465
Projected \$ spent by all website visitors that traveled to MT	1,173,022,015
\$ cost for website	\$629,159
Travel spending per website \$	\$1,864

Recommendations...

Summer Website Evaluation Review

Recommendations

- Focus communications on WA and other key regional states like MN, OR, & CO and secondly on mass markets like CA, TX, & FL, but not NY
- Improve MSN organic search referrals & invest in paid search to drive traffic
- A priority target should be female Baby Boomers aged 45-66, with over \$75k incomes, travelling with an adult, but not travelling with children
- A priority target should be Out of State repeat travelers to MT i.e., those who visit family/friends
- A priority target should be first time website visitors
- Facilitate travel planning, especially trips at least 4 nights long
- Emphasize the most popular activities such as parks, sightseeing, natural landmarks, historic sites, day hiking, wildlife watching; and/or help reinforce Montana's desired image like Native American culture
- Provide more information on specific activities, including town specific activities
- Provide more powerful maps that help with directions, but also help consolidate activity and lodging planning and pricing
- More pictures and video



Thank you.





the sixth sense of businessTM